SUPERMARKET BUSINESS

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MARCH 1990

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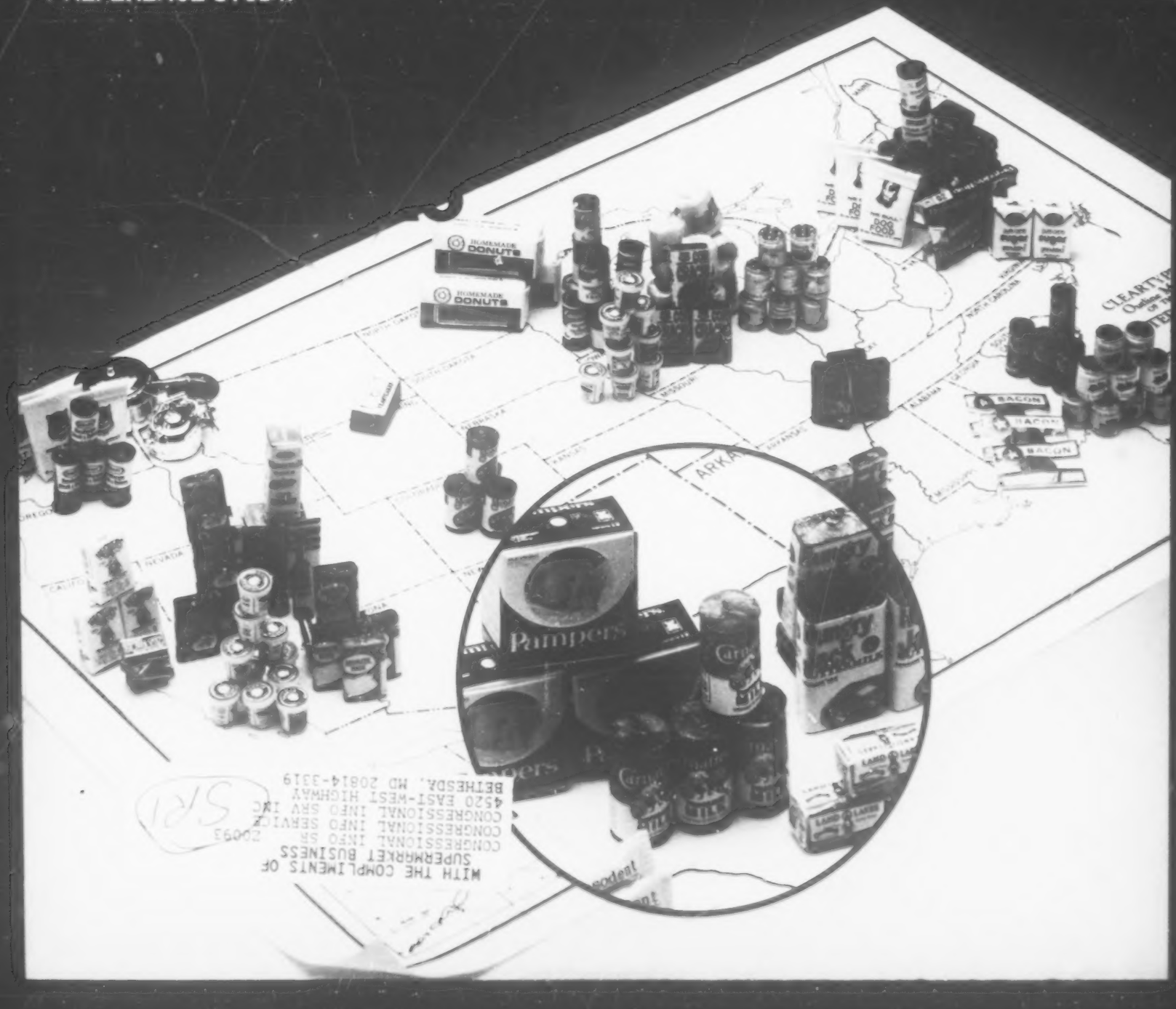

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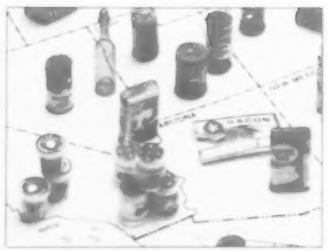

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Cover Photo: Marisa Pellegrini

GLORIOSKY, YEAR 2000!

By Ken Partch, Editor-in-Chief

In January, in this space, I explained why I could not write about the '90s. John Naisbitt & Patricia Aburdene have no such problem. Their latest sally goes forth into Year 2000. I am certainly glad I didn't try to compete with the "Ten New Directions for the 1990's" as seen by the megaseers.

I just finished reading *Megatrends 2000*, by John Naisbitt & Patricia Aburdene, and like Little Orphan Annie, I can hardly wait for tomorrow. I feel like singing: Tomorrow, Tomorrow! I love ya, Tomorrow! I can't wait to be 10 years older, and glide into the wonderful Year 2000 when everything will be just wonderful. Gloriosky, Tomorrow!

Megatrends 2000 reads like one of those breathless television commercials that promises you those wonderful bargains on those wonderful things that you can't buy in stores, and every new, wonderful announcement is followed by the promise—"There's more."

Let's take a look at the first of 10 millennial megatrends for the 21st century: "The Booming Global Economy of the 1990s."

There will be doomsayers, of course, the authors warn, but that's just the pessimism of the nasty media. After all, didn't they run all those terribly negative stories during the Great Expansion of the Reagan Era after 1982, they ask? Yes, we might answer, since it followed one of the worst recessions since the Great Depression. Or perhaps there was no rustbelt in the Midwest. Perhaps it was my imagination, but I believe I read the other day that General Motors would not go away, it would simply be owned and operated by Japanese management. Probably just another one of those negative media stories.

But there's more. Worried about the energy crisis? There is no energy crisis and won't be any to impede the global boom of the 1990s. There is not only more oil available, according to Naisbitt, but we're using less every year. Then why is my oil-heating bill soaring this winter?

And that's not all. Worried about the so-called trade deficit? Forget it. There is no trade deficit. What's more, there is no domestic budget deficit worth worrying about. Naisbitt quotes Milton Friedman, the Nobel prizewinner in economics, to prove it. Isn't it amazing that the budget deficit of $60 billion that we had with

I can't wait to catch the new Naisbitt act on the food industry convention circuit, skipping along into the Year 2000, happy, happy, happy.

Jimmy Carter was taking us to the poorhouse, but now we find that a deficit of $150 billion is practically nonexistent—because, according to Friedman, it is such a small fraction of the national income? This piece of information alone is worth the price of Naisbitt's book at $15.87, discounted from the cover price of $21.95.

Worried about the arts? Not to worry, there's a boom going on here, too, with plenty of momentum to take us into the year 2000, with a museum on every other corner, and a symphony orchestra in every town. Naisbitt has a barrel of statistics to prove that in the U.S. of A. the arts are more popular than sports, because Americans spend more on arts events than they do on sports events—honest.

And here's other proof: "The arts are a natural, inevitable ally for any successful business," says Rawleigh Warner, Jr., former chairman and CEO of Mobil. "We sense in the arts that same search for an ideal of quality and excellence that imbues many of our business decisions."

Prediction: Corporate sponsorship of sports will plateau, while arts sponsorship continues to grow dramatically throughout the next decade.

Reason: Sponsoring the arts is inexpensive. " . . . as the cost of such other business-sponsored programs as rock concerts and sporting events increases, arts activities at all levels will become recognized as the best buy for the money." Any questions?

Nowhere in all this happy talk, and Dr. Feelgood prognostication, is there any discussion of the problems of public education, black poverty (except to say that the educated blacks are moving into the middle class), the homeless, the drug problem, or teenage pregnancy. It is magic time. It is the 21st century. All our problems have melted into the past. It is the best of all possible worlds. No nasty, negative news media here.

But there's still more. There's the making of more happy statistics. Take these: "In 1988, 55,483 new book titles and editions were published in the United States, compared to about 41,000 in 1977 . . . Bookstores in shopping malls make it easier to buy books than it was twenty years ago."

But in case you were wondering where all those writers came from, consider this statistic: "Publishers, who have little trouble finding authors as it is, need not worry where the next wave of writers will come from. More than 200 institutions offer Masters of Fine Arts degrees or doctorates, compared with a dozen twelve years ago." I was not aware that writers emanated from Master's Degree programs in Fine Arts in any regular numbers, any more than do painters or musicians.

I worry more about those suburban bookstores in the nation's shopping malls, where I could not find this book, and where the clerk had never heard of Richard Condon, author of *The Manchurian Candidate*, *Prizzi's Honor* and a new book on the Reagan years.

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BPA ABP

TRADE SCAN

THE WINNERS!

January Contestants Win VCRs as Prizes

Our two lucky winners are John Darrow, owner of Darrow's Country Market (Baraboo, Wis.) and Bruce Kaye, merchandiser for First National Supermarket's 12-store Edward's Food Warehouse division (Windsor Locks, Conn.). Each will receive a VCR.

Darrow has been reading SB for about 6 years. "This is the third time I've entered the contest," he says. "I read the magazine every month, and I really enjoy finding the answers to the contest."

As owner, Darrow is responsible for entire store operations. The supermarket business has been a part of Darrow's life for a long time. He has been involved in the business, which his father started in 1945, since 1961.

Darrow says that he gains an enormous amount of knowledge from reading all the articles.

"I particularly like the deli articles," he says. "We have gotten a lot of ideas on how to merchandise items in our hot and cold deli.

"We even bought new European-style cases, which caused our deli sales to increase. SB helps me with making decisions like that."

Our other winner, Bruce Kaye, is a relatively new SB reader and monthly contestant. He can't claim beginner's luck—he had been reading SB for six months and entering its contest for three months before winning— but his continuing efforts paid off.

"I read SB every month," Kaye says, "mostly to look at new merchandising concepts." Along with the visual information packed into the large photos, he considers SB articles profiling leading stores around the country interesting to read.

The March contest, whose winners will receive a spin/fly fishing travel set, appears on page 103. Correct entries for January appear on page 102.

First Milk, Beef, Pork, and Fish, and Now ... Horseradish

Taking a cue from other industries that have banded together to promote industry sales and viewpoints, an association of a different color has been formed. The Horseradish Information Council will spur sales of commercially processed horseradish on a year-round basis, the industry believes.

"Loyalists already consider horseradish a kitchen staple," says Wendell Christoff, of C.J. Christoff & Sons and Seminole Foods Inc., chairman of the recently-formed council. "Our goal is to teach others how to use the product more effectively and generate more consumer demand."

The council's recipe booklet, "Root for Flavor," suggests using the condiment "in everything from omelets and Bloody Marys to pizza and baked flounder." The council is also gearing its promotional efforts to retailers and food service companies.

April 'Food Fight' Planned By American Cancer Society

Since the unveiling of its HeartGuide program, the American Heart Association has born the slings and arrows of outrageous fortune, as critics have lined up to blast the previously untouchable charity.

Simultaneously, the group has been enjoying the outrageous fortune gleaned from participation fees retailers pay.

Meanwhile, quietly, the American Cancer Society has been organizing its own nutritional effort, dubbed the "Great American Food Fight Against Cancer," to be held April 19.

Based on the Great American Smoke Out, the Food Fight is largely an educational effort to teach consumers the relationship between food and cancer.

That relationship is murky, at best, and less well established than the link between diet and heart disease. Experts frequently disagree about whether diet can substantially lower the cancer risks.

But experts do agree that a healthy diet does help the body fight diseases, including cancers. And events like the Food Fight aren't likely to draw the heated response that has plagued the AHA effort.

Food associations, including the Produce Marketing Association and the National Grocers Association, are backing the program. The Cancer Society is lining up supermarkets that want to participate in events and demonstrations scheduled as part of the Food Fight activities.

Close Encounters: A UFO Letter

Dear SUPERMARKET BUSINESS:

Where can I find a wheelbarrow like the one on page 27 in the February issue?

U.F.O.

Your Unidentified Food/Nonfood Observer (UFO)

Marketers More Cautious on New Introductions

Marketers are approaching the new product arena with increasing caution, according to a new study.

"The explosive growth in the numbers of new products that occurred in the mid-80s is over," says Richard Lawrence, president of Marketing Intelligence Service, Ltd. (Naples, N.Y.).

"The average number of stock keeping units per introduction declined," says Lawrence. "Two-thirds of introductions were line extensions." But the "small proportion of products that are really new grew in 1989 for the second straight year."

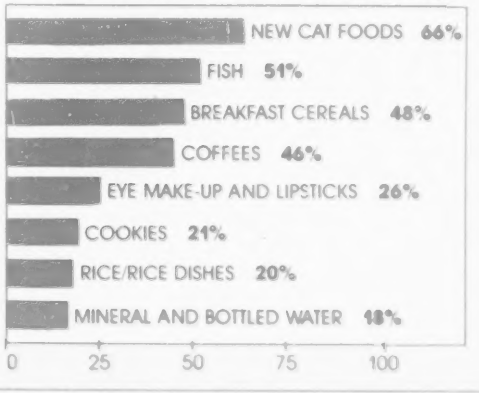
FDA: Tofu an Un-Health Food?

Is the newest threat to the nation's food supply tofu? What has been imported from the Orient to boost the health of consumers in the U.S. may contain a contamination threat. Recently Arthur Mio, national sales manager of Morinaga Nutritional Foods (Los Angeles), a producer of aseptically packaged tofu, sent a letter to Gordon Bennett, president of the Soyfoods Association of America, criticizing the group's stand on tofu safety.

It said, in part, that "the Soyfoods Association and its member firms still fail to comprehend the gravity of the (United States Food and Drug Administration's) findings."

The letter continues, "The U.S. Food and Drug Administration has classified tofu ... as a 'potentially hazardous food' ... Every potentially dangerous food must be kept refrigerated at 45 degrees (Fahrenheit) or below in food stores ... Therefore most of the tofu in America is now sold in violation of federal and state laws."

NEW PRODUCT INTRODUCTIONS
(PERCENT INCREASE FROM 1988 TO 1989)



Although the total number of packaged goods introductions only grew by 1.5 percent between 1988 and 1989, some product categories showed much sharper increases.

NEW TECHNIQUES FOR TARGETING CUSTOMERS

People in different geographical areas have distinct, measurable purchasing habits. This report will show you how to identify—and take advantage of—the profile of your store's shoppers.

PREPARED BY
ROBERT DIETRICH

■ "Shoppers—what *do* they want?" Our variation on Shaw's query about women eludes an easy answer, even in this day when a tap on the PC can often elicit up-to-the-microsecond data from a store's POS monitors.

Product movement data are abundant, but too often are difficult to relate to the day-to-day operational problems that confound every level of supermarket management. Our answer? More data, naturally enough, but data for which we claim two differences:

(1) This report is the most comprehensive attempt ever published to link "geodemographic" analysis (we'll get to that one in a minute) to over 300 product categories sold in supermarkets.

(2) The method of presentation used here makes it easy for the reader first to identify which of 10 "cluster groups" (also explained below) most resembles his or her own store's customer base, and then to compare whether the customers living in the store's trading area are above or below average in their usage of each product category.

Continued on page 29

NOTE TO READERS
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IDENTIFY YOUR OWN TRADING AREA(S)

Based on the characteristics of the people who live there, every ZIP code in the U.S. has been assigned by ClusterPlus to one of the 47 subgroups shown below. For easier comparisons of product usage patterns, these subgroups are classified into 10 major groups. A quick scan of the demographic characteristics that typify each of the 10 major groups will help you select the one (or more than one, if appropriate) that most closely describes your store's trading area. As an extra clue, some of the products for which consumers show above-average or below-average usage are also shown. At the top of the chart, there's room for

Check the major group (or more than one group, if appropriate) that best decribes your trading area. If you would like confirmation of how your ZIP code is actually classified by ClusterPlus, you can obtain that data, free of charge. See page 29.	1	2	3	4
Major Group	**Highly Educated, High Income, Suburban Professionals**	Urban, Mobile Professionals Above Average Income	**Above Average Income, Homeowners, White Collar Families**	Above Average Income, Older, White Collar Workers
Subgroups	• **Established wealthy** • **Mobile wealthy with kids** • **Young affluents with kids** • **Suburban families with teens** • **Established affluents**	• **Affluent urban singles** • Young professionals • Urban retirees and professionals	• **Non-urban working couples with kids** • **Small town families** • **Urban working families**	• Older mobile well educated • Older small town households • Older non-mobile urban households
DEMOGRAPHICS (U.S. Total)	(Vs. U.S. Total)	(Vs. U.S. Total)	(Vs. U.S. Total)	(Vs. U.S. Total)
Income, Household Median—$31,730 Over $50,000—22.6%	$55,175 (+74%) 58.4% (+159%)	$38,318 (+21%) 31.3% (+39%)	$40,091 (+26%) 29.5% (+31%)	$33,665 (+6%) 24.1% (+7%)
Education Graduated college—17.5% Did not graduate high school—25.5%	39.4% (+124%) 9.0% (−65%)	30.1% (+72%) 13.5% (−47%)	18.6% (+6%) 18.1% (−29%)	23.1% (+32%) 18.1% (−29%)
Age Median—40.4 years Over 65—15.9%	41.8 (+3%) 12.6% (−20%)	38.2 (−5%) 13.3% (−16%)	40.8 (+1%) 13.3 (−16%)	44.6 (+10%) 20.6% (+30%)
Occupation Professional/managerial—16.7% Blue collar—7.8%	32.3% (+93%) 4.1% (−48%)	28.5% (+70%) 6.2% (−20%)	19.6% (+17%) 7.8% (—)	18.7% (+12%) 7.5% (−3%)
Working women Full or part time—54.1%	59.0% (+9%)	64.5% (+19%)	63.4% (+17%)	54.2% (—)
Race Blacks—11.0%	2.7% (−75%)	8.9% (−19%)	6.8% (−38%)	6.2% (−44%)
Location Central city—35.5% Suburban—41.3% Rural (Non MSA)—23.2%	30.7% (−14%) 67.8% (+64%) (Too small to compute.)	55.2% (+55%) 40.6% (−2%) (Too small to compute.)	32.7% (−8%) 57.7% (+40%) 9.6% (−59%)	42.2% (+19%) 39.3% (−5%) 18.5% (−20%)
Children in household One or more—41.1% Under age 2—7.9%	38.2% (−7%) 6.0% (−25%)	27.0% (−35%) 5.2% (−35%)	42.1% (+2%) 6.9% (−13%)	32.4% (−21%) 7.0% (−12%)
Regional Density Above average Below average	Northeast, West South, North Central	Northeast, West South, North Central	Northeast, West North Central, South	Northeast South
Home Ownership Live in owned home—67.9%	80.4% (+18%)	46.8% (−31%)	77.1% (+14%)	77.0% (+13%)
DEPARTMENTS/PRODUCT CATEGORIES **Above Average Usage**	Diet cola English muffins Wine Fresh fruit Yogurt Pet products Film Cosmetics Suntan/sunscreen products Vitamins	Wine Imported beer Butter Moist cat food Film Self-stick notes Books Disposable razors, women's Cotton swabs Soft contact lens products	Iced tea mixes Frozen main courses, entrees Frozen vegetables, plain Ice cream novelties Cheese, natural/imported Facial tissues Glass cleaners Tampons Lip balm Vitamins	Canned pasta Frozen vegetables, prepared Yogurt Cottage cheese Insecticides, outdoor Greeting cards Metal polish Soap, personal care, bar, women's Suntan/sunscreen products Indigestion aids
Below Average Usage	Non-diet cola Candy Canned vegetables Catsup Mayonnaise Salt American cheese Auto supplies Denture products Pain-relieving rubs/liquids	Cold breakfast cereals Baby foods and HBA Coffee, ground Coffee, instant Corn chips Canned fruit Frozen foods Ice cream Laundry supplies Auto supplies	Rice Bacon Salt Disposable diapers Scouring powder Disposable lighters Mascara Hair care, women's Mouthwash Laxatives	Corn chips Whipped topping Seasonings/spices Ice cream novelties Dough products, refrig./frozen Disposable diapers Aluminum foil Carpet cleaners Insecticides, indoor Nail polish

you to check the box or boxes of the classification that most closely describes your own trading area. Then, as you read through the data for the more than 300 product categories in this report, you'll be able to note the typical consumption patterns for people who most closely resemble your own customers.

5	6	7	8	9	10
ger Highly Mobile, e Average Income	Younger, Mobile, Below Average Income, Fewer Children	Average Income, Blue Collar Families, Primarily Rural	Below Average Income, Older, Few Children	Less Educated, Low Income, Rural, Blue Collar Workers	Very Low Income, Urban Blacks, Apartment Dwellers
hly mobile young ilies hly mobile working ples rking couples with kids ng ex-urban families	• Young urban educated singles • Group quarters • Young urban ethnics • Young mobile apt. dwellers • Small town apt. dwellers	• Rural families with kids • Low mobility rural families • Average income families in single units • Mobile less educated families • Middle income Hispanics • Average income blue collar families	• Older below average income homeowners • Old rural retirees • Older urban ethnics • Older low income couples • Low income single retirees • Stable blue collar workers • Low income blue collar workers	• Low income farmers • Rural blue collar workers • Rural manufacturing workers • Southern low income workers • Low income black families	• Lowest income urban retirees • Lowest income retirees, old homes • Center city blacks • Lowest income urban blacks • Lowest income Hispanics • Lowest income black female-headed families
I.S. Total)	(Vs. U.S. Total)	(Vs. U.S. Total)	(Vs. U.S. Total)	(Vs. U.S. Total)	(Vs. U.S. Total)
20 (+25%) % (+42%)	$25,024 (−21%) 13.6% (−40%)	$28,697 (−10%) 16.1% (−29%)	$25,436 (−20%) 11.8% (−48%)	$21,493 (−32%) 6.7% (−70%)	$18,237 (−43%) 6.3% (−72%)
% (+14%) % (−36%)	19.1% (+9%) 26.1% (+3%)	10.1% (−43%) 29.5% (+16%)	10.0% (−43%) 32.6% (+28%)	6.6% (−62%) 44.3% (+74%)	10.7% (−39%) 42.9% (+69%)
(−6%) % (−56%)	34.8 (−14%) 13.6 (−14%)	38.0 (−6%) 12.2% (−23%)	44.5 (+10%) 24.6% (+55%)	44.5 (+10%) 21.4% (+35%)	40.8 (+1%) 20.1 (+27%)
% (+32%) % (+12%)	15.4% (−8%) 9.4% (+21%)	12.6% (−25%) 9.7% (+25%)	10.7% (−36%) 8.3% (+7%)	7.2% (−57%) 7.1% (−9%)	7.3% (−57%) 6.0% (−23%)
% (+17%)	56.9% (+5%)	54.2% (—)	46.6% (−14%)	39.8% (−26%)	43.9% (−19%)
% (−30%)	6.8% (−39%)	9.7% (−12%)	4.1% (−62%)	23.5% (+114%)	51.3% (+367%)
% (−13%) % (+40%) % (−51%)	46.9% (+32%) 30.6% (−26%) 22.4% (−3%)	34.0% (−4%) 43.7% (+6%) 22.3% (−4%)	30.9% (−13%) 29.0% (−30%) 40.1% (+73%)	12.8% (−64%) 20.2% (−51%) 67.0% (+190%)	73.4% (+106%) 14.6% (−65%) 12.1% (−48%)
% (+27%) % (+12%)	32.7% (−21%) 7.3% (−8%)	47.8% (+16%) 9.6% (+21%)	37.9% (−8%) 7.8% (−1%)	45.2% (+10%) 9.0% (+14%)	42.5% (+3%) 10.1% (+27%)
heast	West Northeast, South	South Northeast	Northeast, North Central West	South West, Northeast	Northeast West
% (+12%)	45.2% (−33%)	67.0% (−1%)	70.0% (+3%)	75.9% (+12%)	33.3% (−51%)
ldast/snack/nutritional rs foods and HBA chips can foods r/plastic product dry supplies products o tapes, purchase oons polish	Yogurt Disposable diapers Canned cat food Cat litter Shampoo, women's Razors, disposable, women's Dental floss Lip balm Hair conditioners, women's Hair conditioners, men's	Baby foods and HBA Disposable diapers Powdered soft drinks Catsup Mustard Pickles American cheese Milk Pet products Auto supplies	Gelatin desserts Whipped topping Dishwasher detergents, liquid Moist dog food Cigarettes Mascara Hair spray, women's Denture products Diarrhea remedies Laxatives	Regular cola Potato chips Flour Shortening Sugar Bacon Frankfurters Cigarettes Denture products Remedies	Candy Evaporated milk Catsup Rice Bacon Aluminum foil Air fresheners/sprays Nail polish Hair conditioning treatments, women's Hair conditioning treatments, men's
r gh products, refrig./ een washer detergents, uid et cleaners ning pads e permanents ure products powder ives	Baked goods Ground coffee Puddings/pie fillings Bottled sauces Spaghetti sauce Salad dressing Paper/plastic products Laundry supplies Household cleaners Batteries	Frozen vegetables, plain Frozen vegetables, prepared Yogurt Disposable wipes Metal polish Facial cleansers, women's Hair conditioning treatments, women's Dental floss Lip balm Soft contact lens products	Frozen main courses/ entrees Frozen french toast/ pancakes Cheese snacks Cheese, natural/imported Automatic dishwasher detergent Glass cleaners Floor wax/polish Canned cat food Lipstick/lip gloss Self-stick notes	Diet cola Wine English muffins Bagels Yogurt Light bulbs Film Nail polish Vitamins Soft contact lens products	Ground coffee Canned soup Fresh fruit Frozen foods Sour cream Plastic kitchen wrap Pet supplies Auto supplies Microwave cookware Video tapes, rental

How to Match Product Performance To Your Store's Potential

■ The table shown here is typical of the format used to report on the supermarket departments and product categories included in this report. The statistics for each product category are based on Mediamark's projections to the *total U.S.*, or what you might think of as the "national average."

Interesting stuff—but, of course, your trading area and the tastes and needs of your customers are a unique mix. Every one of these tables is designed to show you just how your customers differ from the national average, buying lots more of one particular product category than people living elsewhere, while giving a virtual cold shoulder to another product category.

This is both accessible and actionable data, and there are some pointers on the opposite page suggesting some actions you can take based on your customer's predisposition toward or against a category. But first, take a minute or so to review just what the various elements of each table mean:

(A) The various product categories have been grouped into classes that can be recognized as roughly equivalent to standard supermarket departments. The base group is the one that was surveyed by Mediamark (Adults, Men, Women, Female Homemakers) because it represents the acknowledged consuming constituency for the category.

(B) Unless otherwise indicated, the percentage of the base group who qualify as users is shown. For product categories is this report, the relevant usage period cited in the MRI questionnaire may range from as little as the most recent seven days for a high-frequency-of-usage product, to as much as six months or a year for low-frequency products. The designation "(HU)" next to the category name denotes *heavy* users. It's important to break out heavy users for many of the products that supermarkets sell for two reasons:

(1) Heavy users typically account for 80% or more of tonnage, so they are critical to any category's prospects, and

(2) they eliminate the lack of usage discrimination between groups that is found in categories that are universally used by every geodemographic group, e.g. toilet paper.

(C) Data are broken out in this report for 10 major geodemographic groups based on ClusterPLUS classifications. On pages 22-23, a detailed demographic breakout is given for each of the 10 groups so that you can easily identify the one (or perhaps more) that best describes the people who live in your immediate trading area. Keep this group in mind as you read the report, so you can study the extent to which your customers are more or less likely to consume a certain product category.

(D) It's important to know the relative overall interest of your customers in an individual department, in addition to the various product categories that make up that department. The chart shown here is a simple average of the percentage plus or minus performance of the categories that are included. In this example, Group 7 (+ 21%) shows the highest average interest in the categories that make up the Oils/Dressings/Condiments department. But Group 2 shows interest that is 27% below average. Clearly a store manager operating in a Group 7-type trading area (Average Income, Blue Collar, Families, Primarily Rural) should approach this department with priorities that are distinctly different from a manager in a Group 2-type trading area (Urban, Mobile Professionals, Above Average Income).

(E) Most front-line, day-to-day decisions need to be based on your customers' commitment to an individual product category. Nationally, 9.8% of female homemakers are heavy users of mayonnaise or mayo-type salad dressings. But operators in Group 10-type areas (Very Low Income, Urban Blacks, Apartment Dwellers) can expect 14.4% of their customers to be heavy users (+ 47%), while the incidence drops in Group 1 areas (Highly Educated, High Income, Suburban Professionals) to only 7.4% (− 24%). With roughly twice as many heavy users of mayonnaise as Group 1 managers face, Group 10 managers obviously have to make special accommodations that reflect the category's relatively high appeal.

OILS/DRESSINGS/ CONDIMENTS (BASE = FEMALE HOMEMAKERS) (A)	PERCENT WHO USE (B) (1989)	USE BY GEODEMOGRAPHIC GROUP (+/− % VS. TOTAL U.S.) (C)									
		1	2	3	4	5	6	7	8	9	10
(D) + Average −		−11	−27	+ 3	− 6	+ 6	−20	+21	− 9	+13	+12
Catsup (HU)	9.2	−59	−48	− 9	−32	+ 7	−30	+50	−13	+39	+66
Mayonnaise/Mayo-Type Salad Dressing (HU) (E)	9.8	−24	−29	− 8	− 2	+10	−17	+ 9	−16	+29	+47
Mustard (HU)	9.2	+15	−32	+18	− 9	− 5	−14	+27	−24	− 1	+ 9
Oil, Salad or Cooking (HU)	16.7	−16	−29	+ 3	+ 6	+ 4	−22	+11	− 6	+18	+15
Pickles (HU)	9.1	−16	−38	− 6	− 9	+ 4	−27	+40	− 2	+25	−24
Pickle Relish	34.6	+ 4	−11	+11	—	+ 9	− 8	+ 3	− 4	−11	− 2
Salad Dressing (HU)	28.1	+17	− 3	+14	+ 3	+11	−24	+ 4	− 1	− 9	−28

Some Definitions

Product User: To qualify as a user of a particular product category, a person must have used a product in that category within the relevant time period as definely by the Mediamark questionaire. The qualifying period may be as small as the most recent seven days for a high-frequency product, or as much as six months or a year for low-frequency products.

Heavy Users: Users of a product category are arrayed into heavy, medium and light users, according to the frequency with which they used the product in the relevant period. While heavy users account for a minority of all users, they usually account for a strong majority of product "tonnage." Because of their more skewed demographic profiles, they provide valuable insight into target marketing.

Base Group: Those identified by Mediamark together with the marketers and advertisers who use its statistics, as the primary users of a particular product category. Four base groups are shown.

Adults: Those age 18 and over where both men and women purchase the product for personal use (e.g., toothpaste).

Men/Women: Again, those age 18 and over, but where products (primarily health and beauty aids) are used by sex.

Female Homemakers: The homemaker is the person designated as the one who does most of the shopping for groceries and household items. Products purchased for the household are based on female homemakers. (Mediamark also publishes data on usage by male homemakers.)

Geodemographic Data: A New Tool To Help Solve Old Problems

■ For better or worse, your store—and the people who shop there—are unique. The point at which many store managers fully realize the implications of this observation is when they become responsible for a store in a different location. Suddenly they observe softer sales of bagels and stronger sales of disposable diapers—or the other way around. What gives?

Framed in terms appropriate to the format of this report, the answer is simply that they've moved to a store with a different "geodemographic" composition. Different strokes for different folks, you know—and don't forget different shopping lists, too.

The new location needn't necessarily be *physically* far away, as a drive across a typical town could easily take you through the turf of three or more geodemographic groups in 20 minutes. The boundaries are invisible, but the differences in the ways people in the different geodemographic clusters eat, drink, take care of their health, feed their pets, clean their houses, etc., are palpable—and of critical concern to supermarkets that serve them.

This report details for the first time the differences in buying habits for individual product categories sold in the supermarket by 10 major geodemographic groups. Who can use this data? Who *needs* to use this data to beat the competition?

The answer is just about anybody involved in any aspect of marketing or selling the products that are distributed through supermarkets. This includes the manufacturers and processors who need to know where they can most productively concentrate their advertising and promotional efforts, where it's most vital to win warehouse and shelf space, and where gaining authorization for instore displays and weekly ad mentions will pay off best.

No less interested, of course, are the executives at chain and wholesaler warehouses who are responsible for a wide range of decisions that ultimately affect the positioning and attention that each product category gets at store level. The more data these decision-makers have as to the relative strength of each product category *by store*—based on each store's geodemographic profile—the more effective their decisions will be.

At the store level, both store managers and managers of individual departments will find a wide range of applications for these data. While instinctively realizing that their mix of customers is different from that in other stores they visit (older or young, richer or poorer, professional or blue collar, etc.), they've never been sure just how profoundly these differences affect category-by-category sales. By reviewing this report, they will now have the tools to relate the characteristics of their customer base with what those customers like to buy in a supermarket.

While the applications are virtually unlimited in every part of the store and for every type of managerial decision, here are a few areas in which this new geodemographic data will prove especially useful:

—Placing departments in traffic flow.
—Allocating relative space by department.
—Allocating relative space by product category.
—New item authorization.
—Number of brands carried per category.
—Number of items carried per brand.
—Number of facings per item or category.
—Space in weekly store ad.
—Instore display authorization.
—Instore sampling.

Linking Two Powerhouse Research Sources To Give New Insight Into Product Usage Patterns

Mediamark:
Projecting 20,000 Households Into a Portrait of America's Purchasing and Media Habits

The database of Mediamark Research Inc. (MRI) is the source of the product usage projections shown in this report. Over 700 companies subscribe annually to Mediamark's syndicated reports. They use the data primarily to support the placement of advertising through target marketing, for user profiles, and for geodemographic and lifestyle analyses.

Subscribers include advertisers and their agencies, as well as magazines and broadcast companies. Among the subscribers whose names are familiar to both supermarket shoppers and executives are Campbell Soup Company, Kraft General Foods and The Procter & Gamble Co.

MRI data are derived from an annual national probability survey of 20,000 individuals who participate in both personal and self-administered surveys that cover the demographics, product usage and media exposure of all persons 18 and over.

Statistics are compiled on 3,500 product categories and services, and 5,700 individual brands. Basic product usage and media data are published annually in 20 volumes.

Sylvia Cassel, senior vice president, administration, says, "Many of our subscribers find added value in MRI data through a linkage to one of the several geodemographic systems, such as ClusterPLUS, that are accessible from our databank."

Users of such linked data must, of course, also be subscribers to the clustering system they want to access. They can then tap into the database through MRI's PC-based MEMRI ™ system, or through online access. "Merged with Mediamark media and product data," Cassel says, "these geodemographic systems provide a method of making media and product usage projections, as measured by MRI, for the lifestyle/demographic segments described by the cluster system. Direct mail uses, local market projections and site selections are common applications."

To find out more about the categories mentioned in this report, or about Mediamark services in general, contact:
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New York, NY 10017
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ClusterPLUS:
Defining 47 Geodemographic Clusters to Predict What People Buy Based on Where They Live

ClusterPLUS is a geodemographic system offered by Donnelley Marketing Information Services, Stamford, Connecticut.

The system categorizes small geographic areas based on the idea that "birds of a feather flock together." Put another way, people who live in the same neighborhood tend to have many similar behavioral characteristics.

"The combination of such factors as income, presence of children, and age creates lifestyles that predispose individuals to purchase certain goods and services," says Julie Brierly, marketing manager for ClusterPLUS.

Based on updated census data and current year demographics, and developed through a proved statistical methodology that incorporates over 1,600 demographic variables, ClusterPLUS identifies 47 unique clusters. Based on shared characteristics, these 47 clusters are grouped into 10 multi-factor cluster groupings that are used in this SUPERMARKET BUSINESS report.

With geodemographic targeting finding an ever-wider variety of applications, ClusterPLUS is gaining in popularity as a marketing tool, according to Brierly. Some typical uses include: defining marketing targets; profiling customers; evaluating sites; locating test markets; developing media plans; evaluating advertising effectiveness; and developing direct marketing strategies. Several supermarket companies use the ClusterPLUS serviced for their site selection programs.

"Many of our subscribers enhance the value of the ClusterPLUS data," says Brierly, "by combining it with product usage and media data such as that provided by MRI. But the SUPERMARKET BUSINESS study is the largest-scale application I'm aware of."

Note: To help SUPERMARKET BUSINESS readers apply the data in this study to their own retail locations, ClusterPLUS is generously offering to identify in which of the 10 groups a store's ZIP code is classified. See page 29.

Further information about the various marketing problems that can be solved by ClusterPLUS can be obtained from:
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Donnelley Marketing
P.O. Box 10250
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Product categories, like groups of people, have their own individual "fingerprints." Matching the two sets of fingerprints can help maximize store sales.

Continued from page 29

A definition to live with

What is "geodemographics?" The word is simply a combination of "geography" with "demography," and it is used to characterize consumer behavior patterns. The geographic unit that's defined according to its demographic characteristics is typically called a "cluster"; but what it really is is a neighborhood, one in which people tend to share the same characteristics, such as levels of income and education, age, kinds of professions, presence of children, and lifestyles. Typically, the cluster is synonymous with a ZIP Code, but other definitions are sometimes used.

Most of the people who patronize your supermarket are likely to live fairly close to your store. Thus, they share the same "geo" element, and—because people tend to like to live near people who resemble themselves—they also share the same "demographics." So your store's trading area can be said to have a unique demographic "fingerprint."

But how does knowing this help predict what they buy more or less of compared to people in other trading areas with quite different geodemographic fingerprints? The answer is that market research has long quantified the strong correlation between demographics and product purchase patterns. Looked at most simplistically, for example, demographically targeted marketing plans for disposable diapers and for dentifrices would be expected to have little overlap. So every product category sold in the supermarket has its own individual demographic "fingerprint," too.

Matching up

Obviously, making a match between the two sets of fingerprints can help maximize store sales.

First, you need to know what the usage patterns of the type of people living in your trading area are on a category-by-category basis. Then you must match these needs with the usage profiles of each product category.

You can then identify all the categories whose biggest fans are the types of people who live near your store, and turn the promotional gas up under them. You can even give them more shelf space at the expense of categories in which your type of customer shows only soft, below-average interest.

Prior to the publication of this report, such valuable and actionable data was rarely, if ever, available to supermarket retailers, particularly at the store level. But thanks to the cooperation of two of the leading market research organizations in the U.S., any supermarket operator can improve sales performance by making a better match between customer mix and merchandise mix.

The multidimensional profile that emerges here is made possible by linking the resources of Mediamark Research Inc., the largest consumer database in America, with ClusterPLUS, the most powerful and precise demographic targeting system. (See the company profiles on pp. 24-25.)

Match the match

ClusterPLUS finely tunes its classifications into 47 clusters, a degree of detail that is beyond the scope of presentation or comprehension for a published study such as this one. Based on shared characteristics, however, these 47 clusters have been combined into 10 major geodemographic groups. These 10 groups are the basis of this report.

The descriptions of the 10 groups on pages 22-23 allow a comparison over a wide range of demographic factors. From these, readers can decide which of the 10 groups most closely approximates (we don't expect a glove fit here) their store's trading area.

Taking these 10 groups as individual bases, Mediamark then ran the product usage data for 20,000 respondents. The results are reported by individual product categories which are further grouped into departments.

As you compare the category-by-category statistics reported for your trading area's equivalent group with what you observe in your day-to-day experience, your reaction may vary from "Yes, they do buy more of that! Maybe I should give that category more attention in our store-wide promotion next week," to "Maybe I'm not giving that category enough of a chance," to "No wonder the stuff just sits there. My kind of customer just won't buy it no matter how hard I promote it."

What's the word?

Sounding somewhat like those calendars that try to force-feed a new word every day, we're advocating "geodemographic" for supermarket operators today. Admittedly, it's just a more precise restatement of what successful store operators have always known—you've got to match your product mix to your customer mix. But now you've got the hard figures to help make it happen.

IMPORTANT NOTE TO READERS:

Would you like some confirmation that you have correctly identified which of the 10 groups your trading area belongs to? If so, you just let us know your ZIP code(s)—on company letterhead, please, along with a stamped return envelope—and we'll pass your request along to ClusterPLUS. They'll zip your ZIP past their computers and let you know which groups correspond to your trading areas.

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DRY GROCERY (FOOD)

BABY FOODS (BASE = FEMALE HOMEMAKERS)	PERCENT WHO USE (1989)	USE BY GEODEMOGRAPHIC GROUP (+/− % VS. TOTAL U.S.) 1	2	3	4	5	6	7	8	9	10
+ Average −		− 8	− 55	+ 3	− 17	+ 20	+ 16	+ 30	− 22	− 11	+ 10
Baby Foods	6.6	− 2	− 45	+ 6	− 3	+ 23	+ 26	+ 14	− 36	− 4	+ 6
Infant Cereal	5.7	− 12	− 68	+ 5	− 15	+ 28	− 2	+ 46	− 14	− 17	− 12
Infant Formula, Prepared	5.1	− 9	− 53	− 3	− 32	+ 10	+ 25	+ 31	− 17	− 11	+ 36

Overall, 7.9% of U.S. households have a child under age 2 on the premises, a figure that rises to 9.6% for Group 7 and 10.1% for Group 10. Stores in both of these trading areas are obviously prime candidates for expanded Baby Foods sections. But the product mix within the section needs to be carefully modulated, with infant cereals showing strong usage among the blue-collar families of Group 7, but not much action among the low-income urban blacks of Group 10. Babies are also abundant in areas where Groups 5 and 6 live.

BEER (BASE = ADULTS)	PERCENT WHO USE (1989)	USE BY GEODEMOGRAPHIC GROUP (+/− % VS. TOTAL U.S.) 1	2	3	4	5	6	7	8	9	10
+ Average −		+ 12	− 6	+ 11	− 8	− 2	− 2	− 6	− 17	− 12	+ 59
Ale	2.3	+ 66	+ 3	+ 13	+ 21	− 1	+ 24	− 15	− 28	− 44	− 18
Beer, Regular, Domestic (HU)	12.9	− 14	+ 3	+ 1	− 20	− 3	+ 3	+ 14	+ 12	− 7	− 1
Beer, Imported	13.8	+ 54	+ 36	+ 13	− 3	+ 8	+ 27	− 18	− 33	− 52	+ 22
Beer, Low-Calorie, Domestic	16.5	+ 8	− 10	+ 24	+ 1	+ 7	+ 10	− 3	− 14	− 11	− 24
Beer, Low Alcohol	0.9	+ 2	− 2	+ 17	+ 6	− 15	− 46	+ 6	− 8	− 37	+ 135
Malt Liquor	2.1	− 44	− 64	− 3	− 55	− 9	− 32	− 21	− 28	+ 82	+ 237

(HU) = Heavy Users

The standard flagbearer of this category is, of course, regular domestic beer, which needs a generous space assignment in any store. But a look at demographic preferences can be valuable in deciding how to fill out the section with other varieties that shoppers demand. Imported beers, for example, are purchased with above-average frequency by the high-income professionals who make up Groups 1 and 2. Imports also pull in Group 6, which includes young, urban, educated singles, and in the low-income black urban areas of Group 10. Malt liquor's mostly black constituency is confirmed by its usage in Group 10 at almost 2.5 times the national rate.

BAKED GOODS (BASE = FEMALE HOMEMAKERS)	PERCENT WHO USE (1989)	USE BY GEODEMOGRAPHIC GROUP (+/− % VS. TOTAL U.S.) 1	2	3	4	5	6	7	8	9	10
+ Average −		+ 15	− 9	+ 9	+ 3	+ 10	− 15	+ 2	− 2	− 15	− 7
Bread (HU)	19.0	− 8	− 30	—	− 18	+ 4	− 29	+ 19	+ 5	+ 7	+ 28
Bread Crumbs/Coating Mixes	35.3	+ 20	+ 11	+ 22	+ 29	+ 7	− 18	− 9	− 4	− 34	− 13
Cookies, Ready-to-eat (HU)	20.4	− 3	− 16	+ 5	+ 11	+ 12	− 20	− 1	− 6	+ 11	− 4
Crackers (HU)	29.6	+ 9	− 18	—	− 7	+ 15	− 16	+ 8	− 2	− 2	− 6
English Muffins	46.0	+ 35	+ 11	+ 20	+ 20	+ 8	− 10	− 7	− 7	− 43	− 18
Snack Cakes (HU)	13.7	− 32	− 39	− 6	− 25	− 4	− 16	+ 27	+ 21	+ 24	—
Stuffing Mixes/Products	34.4	+ 4	− 17	+ 12	+ 12	+ 5	− 15	+ 9	− 6	− 12	− 6

(HU) = Heavy Users

Almost every Baked Goods category shows wide swings in consumption across the 10 Groups. Overall, however, stores operating in locations whose trading area is populated by the younger, higher-income types of Group 5 should show the best overall reception for Baked Goods. Both cookies and crackers are strong favorites with this mostly suburban-based population.

A taste for English muffins seems to be acquired simultaneously with money. Where income is above average—Groups 1 through 5—so is consumption of English muffins. Bagels seem to operate on the same principle, as do croissants. So operators in any of these areas need to assign significantly more shelf space to these three categories than those operating in less affluent neighborhoods.

1. High education, very high income, suburban professionals
2. Urban, mobile professionals, high income
3. High income, homeowners, white-collar families
4. High income, older, white-collar workers
5. Younger, high mobility, high income
6. Younger, mobile, low income, few children
7. Average income, blue-collar families, rural
8. Low income, older, few children
9. Low education, low income, rural, blue-collar workers
10. Very low income, urban, blacks, apartment dwellers

Note: For a full description of these groups, see pages 32-33.

Source: Mediamark Research, Inc. and ClusterPLUS

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BAKED GOODS (BASE = FEMALE HOMEMAKERS)	PERCENT WHO USE (1989)	USE BY GEODEMOGRAPHIC GROUP (+/− % VS. TOTAL U.S.) 1	2	3	4	5	6	7	8	9	10
Sweet Rolls/Pastries, Ready-to-eat (HU)	20.7	− 8	− 21	+ 7	+ 3	− 9	− 5	+ 3	+ 1	+ 13	+ 3
Bagels	20.0	+ 66	+ 26	+ 20	+ 21	+ 9	− 16	− 10	− 11	− 71	− 5
Croissants/Crescent Rolls	9.9	+ 67	+ 16	+ 14	+ 9	+ 18	− 13	− 30	− 9	− 40	− 4
Garlic Bread	12.6	+ 2	+ 7	− 13	+ 2	+ 10	− 17	+ 27	− 4	− 7	− 19
Hamburger/Hot Dog Rolls	52.0	+ 8	− 23	− 2	− 2	+ 19	− 15	+ 2	+ 1	+ 8	− 24
Kaiser Rolls	7.1	+ 31	− 29	+ 42	− 20	+ 38	− 6	− 6	− 2	− 51	− 28

Of greater interest to those with more modest budgets are bread and snack cakes, as typified by the figures shown for the blue-collar families of Group 7.

BREAKFAST FOODS (BASE = FEMALE HOMEMAKERS)	PERCENT WHO USE (1989)	USE BY GEODEMOGRAPHIC GROUP (+/− % VS. TOTAL U.S.) 1	2	3	4	5	6	7	8	9	10
+ Average −		0	− 19	+ 3	− 7	+ 11	− 11	+ 9	− 2	+ 1	− 8
Breakfast Cereals, Cold (HU)	24.7	− 2	− 40	+ 6	− 5	+ 18	− 8	+ 13	+ 5	− 5	− 30
Breakfast Cereals, Hot (HU)	14.3	− 5	− 11	− 2	− 13	+ 5	+ 1	− 4	+ 7	+ 22	− 20
Breakfast/Snack/ Nutritional Bars	19.3	+ 29	− 25	+ 13	− 3	+ 39	− 2	+ 11	− 21	− 28	− 40
Honey	31.7	+ 23	− 8	+ 11	− 10	+ 8	− 11	+ 7	− 6	− 20	—
Jams/Jellies (HU)	10.1	− 23	− 14	+ 2	− 5	− 9	− 44	+ 5	+ 3	+ 30	+ 61
Pancake/Waffle Mix	45.1	− 2	− 17	− 1	− 3	+ 5	− 14	+ 9	− 4	+ 10	+ 4
Peanut Butter	81.8	—	− 8	—	− 2	+ 5	− 8	+ 3	+ 1	+ 7	− 12
Table Syrup/Molasses	68.0	+ 2	− 12	+ 4	− 3	+ 10	− 13	+ 5	− 1	+ 2	− 11
Toaster Products	28.9	− 18	− 34	− 3	− 17	+ 20	− 3	+ 31	− 6	+ 6	− 20

(HU) = Heavy Users

Breakfast Foods find their heartiest consumers in Group 5, which includes younger families with children. Over half these households have children, and an above-average proportion live in the suburbs. Their usage of cold breakfast cereals is 18% above the national average, and their taste for breakfast/snack/nutritional bars (+ 39%) is also well developed.

The weakest market for the Breakfast category is the upper income, well-educated urban professionals of Group 2. With relatively few children, and a residence in the central city, they show below average usage of all Breakfast categories, including convenience products such as toaster products.

Cold breakfast cereals make their second-best showing (after Group 5) with the blue-collar families of Group 7.

CANDY (BASE = ADULTS)	PERCENT WHO USE (1989)	USE BY GEODEMOGRAPHIC GROUP (+/− % VS. TOTAL U.S.) 1	2	3	4	5	6	7	8	9	10
+ Average −		− 17	− 12	0	+ 1	− 4	− 6	+ 7	+ 2	+ 7	+ 19
Candy, Individual, Regular-Size (HU)	17.9	− 33	− 21	− 7	− 16	− 8	+ 8	+ 10	+ 9	+ 20	+ 26
Candy, Individual, Big Block/ Thick Bar	12.6	—	+ 8	+ 2	− 6	+ 6	− 5	+ 3	+ 2	− 22	+ 24
Candy, Miniature, Pkg. (HU)	6.9	− 13	− 34	+ 2	+ 8	+ 10	− 30	—	− 2	+ 22	+ 23
Candy, Prepackaged, Loose (HU)	5.0	− 38	− 18	− 21	− 12	− 27	+ 15	+ 21	+ 5	+ 30	+ 51
Chewing Gum (HU)	31.8	− 10	− 7	+ 3	− 7	+ 6	− 6	+ 3	− 8	+ 14	+ 8

(HU) = Heavy Users

As income and education rise, sweet teeth appear less in evidence. The highest overall rate of candy consumption is found among the low-income blacks of Group 10 (+ 19%), with a steady drop to the wealthy professionals of Group 1 (− 17%). The only exception in the pattern is found in boxed chocolates, which most people presumably buy to give away rather than to eat themselves.

1. High education, very high income, suburban professionals
2. Urban, mobile professionals, high income
3. High income, homeowners, white-collar families
4. High income, older, white-collar workers
5. Younger, high mobility, high income
6. Younger, mobile, low income, few children
7. Average income, blue-collar families, rural
8. Low income, older, few children
9. Low education, low income, rural, blue-collar workers
10. Very low income, urban, blacks, apartment dwellers

Note: For a full description of these groups, see pages 22-23.

Source: Mediamark Research, Inc. and ClusterPLUS

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CANDY (BASE = ADULTS)	PERCENT WHO USE (1989)	USE BY GEODEMOGRAPHIC GROUP (+/− % VS. TOTAL U.S.) 1	2	3	4	5	6	7	8	9	10
Cough Drops (HU)	11.2	−33	−12	− 6	+ 9	−19	−19	+ 8	+23	+15	+29
Hard Roll Candy	28.7	− 9	− 3	+ 5	− 7	+ 5	− 3	+ 6	− 5	+ 2	+ 6
Mints (HU)	8.8	−29	−15	+ 1	+12	− 9	− 5	+ 5	+ 8	+ 9	+18
Boxed Chocolates*	19.7	+12	− 3	+19	+26	− 2	−10	+11	−13	−27	−16

(HU) = Heavy Users *Female Homemakers

Hard roll candy shows relatively little variation among the various groups and can be expected to sell as well in one neighborhood as another. By contrast, prepackaged loose candy has little allure in higher-income areas, but is a favorite in those with the lowest income.

CANNED FRUITS/ JUICES/VEGETABLES (BASE = FEMALE HOMEMAKERS)	PERCENT WHO USE (1989)	USE BY GEODEMOGRAPHIC GROUP (+/− % VS. TOTAL U.S.) 1	2	3	4	5	6	7	8	9	10
+ Average −		− 3	−24		− 5	+12	−16	+ 5	+ 3	+ 9	− 8
Beans, Prepared in Sauce (HU)	17.5	−31	−29	−14	−28	− 8	−28	+20	+11	+55	+23
Fruit, Canned/Jarred (HU)	14.7	—	−47	+ 5	− 1	+ 5	−23	+11	+ 7	+14	−19
Fruit Juices/Drinks, Misc. (HU)	18.4	− 1	−34	+ 5	−21	+27	−28	+ 5	+ 4	− 3	+20
Grapefruit Juice	22.6	+13	− 8	− 3	+ 2	+11	− 7	−10	− 5	+ 6	+ 1
Mushrooms, Canned/Jarred	36.7	+17	− 9	+ 8	− 5	+12	− 3	+ 4	+ 3	−16	−33
Tomatoes, Canned (HU)	18.0	+ 8	−35	+17	+14	+20	−10	− 5	− 9	−16	− 2
Tomato/Vegetable Juices	37.0	+13	− 3	+10	+ 5	+ 6	−14	− 1	+ 5	−11	−23
Vegetables, Canned/ Jarred (HU)	17.2	−39	−23	+ 2	−28	+20	−11	+19	+ 5	+39	−32

(HU) = Heavy Users

The two major sections here—canned fruits and canned vegetables—show only sluggish appeal to those whose income and education is above average. But both can be expected to be major attractions to shoppers who live in the blue-collar areas typified by Groups 7 and 9. Interestingly, the lowest-income consumers, the urban blacks of Group 10, mirror the opposite end of the income scale in also eschewing both canned fruits and vegetables.

One canned item that can pull its weight in affluent locales is tomato and vegetable juices, consumption of which decreases along with income and education. Canned beans in a sauce show exactly the opposite pattern.

DESSERTS/BAKING INGREDIENTS (BASE = FEMALE HOMEMAKERS)	PERCENT WHO USE (1989)	USE BY GEODEMOGRAPHIC GROUP (+/− % VS. TOTAL U.S.) 1	2	3	4	5	6	7	8	9	10
+ Average −		− 8	−26	− 5	− 4	+ 4	−15	+12	+ 2	+18	− 9
Artificial Sweeteners* (HU)	8.5	+ 9	− 1	− 4	− 6	+ 9	− 6	+ 9	+ 6	−17	−10
Baking Chips	41.0	+15	−14	+14	+ 5	+ 7	− 6	+13	− 7	− 8	−51
Baking Chocolate, Bar	17.3	+33	−12	+ 4	+ 8	− 8	− 2	+ 8	−20	+ 7	−24
Baking Coconut	26.3	—	−25	− 4	+ 3	+ 3	−17	+ 8	− 2	+26	−19
Baking Mixes (HU)	8.3	−20	−28	−13	−12	+ 9	−29	+ 4	+ 6	+15	+67
Brownie/Cookie Mix	33.2	+ 6	− 1	+13	− 4	+15	−13	+13	− 3	−11	−36
Cake Mixes, Dry	61.0	− 7	−24	+ 2	− 8	+ 4	− 8	+ 7	+ 3	+16	−13

(HU) = Heavy Users
*Adults

To the question "What's for dessert?" the answer in most higher-income households appears most often to be, "Nothing homemade."

For the two most basic ingredients, flour and sugar, the three most affluent groups (1, 2 and 3) are far below the national average in their usage. Both categories do well, however, among the lower-income blue-collar families of Groups 7 and 9. There's more than income to the story, as evidenced by the more modest usage rates of both Group 8 (older with few children) and Group 10 (low-income, urban blacks).

1. High education, very high income, suburban professionals
2. Urban, mobile professionals, high income
3. High income, homeowners, white-collar families
4. High income, older, white-collar workers
5. Younger, high mobility, high income
6. Younger, mobile, low income, few children
7. Average income, blue-collar families, rural
8. Low income, older, few children
9. Low education, low income, rural, blue-collar workers
10. Very low income, urban, blacks, apartment dwellers

Note: For a full description of these groups, see pages 22-23.

Source: Mediamark Research, Inc. and ClusterPLUS

DESSERTS/BAKING INGREDIENTS (BASE = FEMALE HOMEMAKERS)	PERCENT WHO USE (1989)	USE BY GEODEMOGRAPHIC GROUP (+/– % VS. TOTAL U.S.) 1	2	3	4	5	6	7	8	9	10
Evaporated Milk (HU)	8.8	– 44	– 21	– 33	– 19	+ 18	– 15	+ 22	– 23	+ 51	+ 72
Flour (HU)	15.0	– 36	– 54	– 17	– 1	– 1	– 31	+ 21	+ 8	+ 63	– 10
Frosting/Frosting Mixes	9.1	– 16	– 13	+ 8	– 21	– 2	– 3	+ 30	– 8	+ 27	– 34
Gelatin Desserts (HU)	15.3	– 25	– 45	– 3	+ 4	– 4	– 32	+ 7	+ 36	+ 13	—
Nuts for Cooking	38.5	+ 20	– 20	+ 10	+ 7	+ 16	– 13	+ 4	– 4	– 16	– 28
Pie Crusts, Packaged	26.9	+ 3	– 22	—	– 3	+ 16	– 5	– 1	– 6	+ 22	– 33
Pizza Mix	10.7	– 17	– 65	– 15	+ 5	– 5	– 22	+ 19	—	+ 58	– 16
Puddings/Pie Fillings (HU)	13.7	– 16	– 32	– 11	+ 10	+ 3	– 40	+ 16	+ 12	+ 19	+ 7
Shortening	65.5	– 12	– 22	– 3	– 10	– 2	– 11	+ 9	+ 4	+ 24	—
Sugar (HU)	25.8	– 27	– 45	– 14	– 13	– 5	– 11	+ 21	+ 7	+ 45	– 2
Whipped Topping (HU)	7.3	– 23	– 31	– 20	– 33	+ 10	– 9	+ 17	+ 32	+ 27	– 29
Yeast	23.3	– 2	– 21	– 4	+ 12	– 6	– 2	+ 4	– 1	+ 11	– 5

(HU) = Heavy Users

When wealthier Group 1 suburban professionals do whip up something for dessert, they're likely to include baking chips or baking chocolate or nuts in the recipe with greater frequency than blue-collar household bakers.

Among the product categories that show a particularly strong tilt toward usage by lower-income households are gelatin desserts and whipped toppings. But the most demographically distinct pattern of all is that of evaporated milk, where consumption by Group 10 blacks is 72% above average.

FAMILY BEVERAGES (BASE = FEMALE HOMEMAKERS)	PERCENT WHO USE (1989)	USE BY GEODEMOGRAPHIC GROUP (+/– % VS. TOTAL U.S.) 1	2	3	4	5	6	7	8	9	10
	+ Average –	+ 3	– 20	0	– 2	+ 7	– 9	+ 7	+ 1	+ 5	– 12
Coffee, Ground (HU)	11.0	– 8	– 51	+ 12	– 1	+ 28	– 36	+ 10	+ 11	+ 20	– 56
Coffee, Instant or Freeze-Dried (HU)	7.7	+ 2	– 36	– 9	+ 1	– 20	– 16	+ 9	+ 14	+ 35	– 18
Cream Substitute, Non-Dairy	21.4	– 14	– 25	– 1	+ 12	+ 2	– 13	+ 12	+ 3	+ 16	– 23
Drink Additives (Add Milk or Water)	34.2	– 5	– 10	+ 8	– 4	+ 9	– 5	+ 14	+ 2	– 10	– 22
Energy Drinks*	11.6	– 12	+ 1	– 15	– 30	+ 14	+ 9	+ 20	– 6	+ 5	+ 11
Iced Tea Mix, Instant (HU)	9.8	+ 6	– 21	+ 24	+ 21	– 4	– 15	– 8	+ 1	– 4	– 12
Milk, Dry	12.5	– 6	– 14	+ 2	– 4	– 12	+ 18	+ 10	– 29	+ 9	+ 52
Powdered Fruit/Soft Drinks	34.8	– 24	– 23	– 3	– 13	+ 14	– 10	+ 22	– 2	+ 12	—
Tea, Instant	19.5	– 7	– 29	– 12	– 7	– 11	– 5	– 6	+ 14	+ 31	+ 14
Tea, Regular (HU)	15.1	+ 9	– 45	– 3	– 16	+ 13	– 20	—	+ 7	+ 28	– 20
Coffee Beans, Whole	9.5	+ 62	+ 15	+ 2	+ 9	+ 17	– 12	– 11	– 3	– 51	– 10
Instant Coffee, Flavored	9.6	+ 38	—	– 10	+ 13	+ 37	– 8	– 7	– 2	– 33	– 41
Cocoa Powder	35.1	– 3	– 17	+ 5	– 8	– 1	– 7	+ 25	– 4	+ 8	– 28

Coffee, tea or ... ? That's the question that's answered by this category. Starting with the basics—ground and instant coffee—only the lower-income, less educated, mostly blue-collar members of Groups 7, 8 and 9 show above-average usage of both varieties. High-income Group 1 inhabitants go gourmet with their coffee, often preferring to buy either whole coffee beans to grind themselves or flavored instant varieties.

The various varieties of tea show a ragged pattern that does not seem to correlate with income. Regular tea, for example, fills many cups of affluent professionals living in the suburbs, but few in the city.

The blue-collar families of Group 7, with an above-average incidence of children in the household, show the highest rate of usage for powdered fruit/soft drinks.

(HU) = Heavy Users
*Adults

1. High education, very high income, suburban professionals
2. Urban, mobile professionals, high income
3. High income, homeowners, white-collar families
4. High income, older, white-collar workers
5. Younger, high mobility, high income
6. Younger, mobile, low income, few children
7. Average income, blue-collar families, rural
8. Low income, older, few children
9. Low education, low income, rural, blue-collar workers
10. Very low income, urban, blacks, apartment dwellers

Note: For a full description of these groups, see pages 22-23.

Source: Mediamark Research, Inc. and ClusterPLUS

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OILS/DRESSINGS/ CONDIMENTS (BASE = FEMALE HOMEMAKERS)	PERCENT WHO USE (1989)	USE BY GEODEMOGRAPHIC GROUP (+/– % VS. TOTAL U.S.) 1	2	3	4	5	6	7	8	9	10
	+ Average –	– 11	– 27	+ 3	– 6	+ 6	– 20	+ 21	– 9	+ 13	+ 12
Catsup (HU)	9.2	– 59	– 48	– 9	– 32	+ 7	– 30	+ 50	– 13	+ 39	+ 66
Mayonnaise/Mayo-Type Salad Dressing (HU)	9.8	– 24	– 29	– 8	– 2	+ 10	– 17	+ 9	– 16	+ 29	+ 47
Mustard (HU)	9.2	+ 15	– 32	+ 18	– 9	– 5	– 14	+ 27	– 24	– 1	+ 9
Oil, Salad or Cooking (HU)	16.7	– 16	– 29	+ 3	+ 6	+ 4	– 22	+ 11	– 6	+ 18	+ 15
Pickles (HU)	9.1	– 16	– 38	– 6	– 9	+ 4	– 27	+ 40	– 2	+ 25	– 24
Pickle Relish	34.6	+ 4	– 11	+ 11	—	+ 9	– 8	+ 3	– 4	– 11	– 2
Salad Dressing (HU)	28.1	+ 17	– 3	+ 14	+ 3	+ 11	– 24	+ 4	– 1	– 9	– 28

(HU) = Heavy Users

"Hold the mayo," is a demand most likely to be heard among the affluent professionals of Group 1 and 2. The above-average-income suburban families of Group 5 like the spread, however, as do those at the low end of the income scale (Groups 9 and 10). Stores in these less affluent areas can also count on good sales volume for catsup and salad or cooking oils.

The wealthy suburban professionals of Group 1 are the most loyal buyers of bottled salad dressings, which may help to explain their relative disinterest in salad oils.

PACKAGED SPECIALTY FOODS (BASE = FEMALE HOMEMAKERS)	PERCENT WHO USE (1989)	USE BY GEODEMOGRAPHIC GROUP (+/– % VS. TOTAL U.S.) 1	2	3	4	5	6	7	8	9	10
	+ Average –	– 3	– 17	+ 1	– 4	+ 13	– 10	+ 14	– 5	0	– 9
Chicken, canned	10.0	+ 1	– 21	– 10	– 3	+ 20	– 16	+ 29	– 1	– 6	– 32
Chili, Canned	27.0	– 5	– 28	– 3	– 22	+ 24	+ 2	+ 29	– 20	+ 6	– 13
Deviled Ham/Other Meat Products	17.2	– 24	– 26	– 16	– 9	+ 4	– 10	+ 26	– 8	+ 44	– 18
Dinner Mixes, Packaged (HU)	16.0	– 11	– 47	+ 12	– 19	+ 9	– 8	+ 19	+ 13	– 17	+ 3
Hash, Canned	14.7	– 3	– 4	– 14	– 8	+ 16	– 17	– 3	– 11	+ 27	+ 29
Mexican Foods	41.1	+ 12	– 11	+ 2	– 12	+ 29	+ 5	+ 18	– 9	– 20	– 40
Pasta, Canned	22.8	– 27	– 31	—	+ 17	+ 9	– 20	+ 21	– 12	+ 3	+ 26
Potatoes, Instant	37.3	—	– 29	+ 9	– 4	+ 11	– 3	+ 8	– 11	+ 8	– 11
Pasta, Packaged (HU)	26.3	+ 4	– 2	+ 2	+ 11	+ 10	– 22	+ 7	– 5	– 11	+ 8
Rice (HU)	12.8	– 1	– 26	– 22	– 21	+ 6	– 12	– 2	– 2	+ 35	+ 44
Rice, Flavored/Seasoned	37.7	+ 19	+ 5	+ 14	– 3	+ 25	+ 1	+ 5	– 13	– 34	– 23
Olives	41.8	+ 25	– 2	+ 9	+ 12	+ 18	– 10	+ 3	– 6	– 24	– 38
Soup, Canned (HU)	44.4	—	– 5	+ 7	– 1	+ 11	– 11	+ 6	+ 3	+ 4	– 36
Soup, Dry/Bouillon Cubes (HU)	14.5	+ 5	– 21	+ 15	+ 9	+ 7	– 16	+ 20	+ 3	– 35	– 13

(HU) = Heavy Users

The average-income blue-collar families of Group 7 are good customers for many of these categories, including canned tuna, stews, chicken, chili and pasta.

Rice shows a dual personality, with higher-income households showing above-average usage of flavored or seasoned varieties and lowest-income households showing above-average usage of plain rice.

While most of these categories have trouble succeeding among those at the upper end of the income scale, an outstanding exception is olives, which shows a rate of usage among Group 1 suburban professionals 25% above the national average, suggesting the need for stores in these areas to stock as many sizes and varieties as possible, giving them the shelf space that some other packaged specialty foods don't merit.

1. High education, very high income, suburban professionals
2. Urban, mobile professionals, high income
3. High income, homeowners, white-collar families
4. High income, older, white-collar workers
5. Younger, high mobility, high income
6. Younger, mobile, low income, few children
7. Average income, blue-collar families, rural
8. Low income, older, few children
9. Low education, low income, rural, blue-collar workers
10. Very low income, urban, blacks, apartment dwellers

Note: For a full description of these groups, see pages 22-23.

Source: Mediamark Research, Inc. and ClusterPLUS

PACKAGED SPECIALTY FOODS (BASE = FEMALE HOMEMAKERS)	PERCENT WHO USE (1989)	USE BY GEODEMOGRAPHIC GROUP (+/− % VS. TOTAL U.S.) 1	2	3	4	5	6	7	8	9	10
Tuna, Canned (HU)	22.2	− 1	+ 4	+ 12	+ 11	+ 11	− 13	+ 12	− 14	− 16	− 4
Stews, Canned	17.5	− 39	− 32	− 7	− 16	+ 4	− 7	+ 23	+ 8	+ 36	− 18

(HU) = Heavy Users

SAUCES (BASE = FEMALE HOMEMAKERS)	PERCENT WHO USE (1989)	USE BY GEODEMOGRAPHIC GROUP (+/− % VS. TOTAL U.S.) 1	2	3	4	5	6	7	8	9	10
+ Average −		+ 9	− 12	+ 7	+ 2	+ 22	− 22	+ 7	− 7	− 13	− 2
BBQ/Seasoning/Misc. Sauces, Bottled (HU)	17.9	− 7	− 42	+ 5	− 10	+ 42	− 50	+ 23	− 14	+ 7	+ 9
Gravy/Sauce Mixes	28.0	+ 16	− 7	+ 11	+ 5	+ 18	− 7	+ 2	− 14	− 22	—
Soy Sauce	39.2	+ 19	+ 15	+ 11	+ 8	+ 14	− 7	—	− 4	− 26	− 33
Spaghetti Sauce (HU)	13.5	+ 8	− 13	− 1	+ 4	+ 15	− 24	+ 1	+ 3	− 12	+ 15

(HU) = Heavy Users

One or more bottles of sauce is most likely to be found on the dinner tables of the younger, highly mobile, above-average-income families that comprise Group 5. Many live in the suburbs, and they're most likely to be found in the West and least likely in the Northeast. They're also good prospects for the three other sauce department categories reported on here. Spaghetti sauce shows a sawtoothed pattern of usage, with some boosters among the highest (Group 1), middle (Group 5) and lowest (Group 10) segments as defined by household income.

SNACKS (BASE = FEMALE HOMEMAKERS)	PERCENT WHO USE (1989)	USE BY GEODEMOGRAPHIC GROUP (+/− % VS. TOTAL U.S.) 1	2	3	4	5	6	7	8	9	10
+ Average −		+ 1	− 29	+ 4	− 1	+ 17	− 11	+ 5	− 3	+ 2	− 10
Corn/Tortilla Chips & Cheese Snacks (HU)	9.9	+ 12	− 53	+ 5	− 28	+ 50	− 23	+ 5	− 11	+ 5	− 5
Nuts* (HU)	9.2	+ 3	− 27	− 5	+ 6	− 8	− 3	− 8	+ 15	+ 3	+ 15
Popcorn Snacks/Popping Corn (HU)	19.4	− 11	− 26	—	+ 16	+ 23	− 1	+ 4	− 4	+ 7	− 44
Potato Chips (HU)	19.7	− 21	− 36	—	− 16	+ 23	− 21	+ 16	− 6	+ 21	+ 9
Pretzels	30.8	+ 13	− 18	+ 19	+ 14	+ 11	− 13	− 1	− 3	− 18	− 21
Meat Snacks	20.0	+ 7	− 16	+ 6	+ 3	+ 2	− 6	+ 12	− 6	− 5	− 14

(HU) = Heavy Users *Adults

Strategies for maximizing snack rack sales need to be carefully modulated in line with neighborhood demographics. Corn/tortilla chips and cheese snacks, for example, sell well among suburban professionals but are shunned by their urban equivalents. Their best performance, however, is among the younger, above-average-income families of Group 5 (+ 50%). But then, almost all snacks whet the appetites of this group, which also leads in the rate of consumption of both popcorn and potato chips.

SOFT DRINKS (BASE = ADULTS)	PERCENT WHO USE (1989)	USE BY GEODEMOGRAPHIC GROUP (+/− % VS. TOTAL U.S.) 1	2	3	4	5	6	7	8	9	10
+ Average −		+ 8	+ 2	+ 4	− 6	+ 7	+ 2	+ 8	− 8	− 15	− 2
Cola Drinks, Diet (HU)	18.4	+ 24	+ 4	+ 10	+ 14	+ 8	− 5	− 5	− 9	− 29	− 5
Cola Drinks, Regular, Not Diet (HU)	16.9	− 34	− 19	− 7	− 26	+ 11	+ 3	+ 23	− 1	+ 17	+ 13
Soft Drinks, Diet (Not Cola) (HU)	8.3	+ 4	− 15	+ 8	− 1	+ 7	− 4	+ 27	− 4	− 16	− 42

(HU) = Heavy Users

The need for customizing the relative amount of shelf space given to diet and non-diet colas is dramatically illustrated by the usage figures shown here. The higher-income Groups 1 through 4 all show high usage of diet cola drinks, but relative low usage of non-diet colas. The high-income suburban professionals of Group 1, for example, are 24% above the national average for diet colas but 34% below average for non-diet colas. The flip side of this pattern is evidenced by lower-income consumers, typified by the rural blue-collar workers of Group 9.

1. High education, very high income, suburban professionals
2. Urban, mobile professionals, high income
3. High income, homeowners, white-collar families
4. High income, older, white-collar workers
5. Younger, high mobility, high income
6. Younger, mobile, low income, few children
7. Average income, blue-collar families, rural
8. Low income, older, few children
9. Low education, low income, rural, blue-collar workers
10. Very low income, urban, blacks, apartment dwellers

Note: For a full description of these groups, see pages 22-23.

Source: Mediamark Research, Inc. and ClusterPLUS

TARGETING YOUR TRADING AREA

SOFT DRINKS (BASE = ADULTS)	PERCENT WHO USE (1989)	USE BY GEODEMOGRAPHIC GROUP (+/− % VS. TOTAL U.S.) 1	2	3	4	5	6	7	8	9	10
Soft Drinks, Regular (Not Cola) (HU)	12.8	− 21	− 5	− 3	− 26	− 3	+ 7	+ 10	− 2	+ 21	+ 19
Water, Bottled	22.0	+ 68	+ 45	+ 11	+ 9	+ 12	+ 11	− 17	− 26	− 67	+ 6

(HU) = Heavy Users

SPICES/EXTRACTS/MISC. (BASE = FEMALE HOMEMAKERS)	PERCENT WHO USE (1989)	USE BY GEODEMOGRAPHIC GROUP (+/− % VS. TOTAL U.S.) 1	2	3	4	5	6	7	8	9	10
+ Average −		− 6	− 24	+ 1	− 10	+ 7	− 18	+ 10	− 1	+ 24	− 3
Extracts	42.0	+ 7	− 18	+ 10	+ 9	+ 7	− 17	+ 2	− 5	+ 1	− 12
Meat/Fish Extenders	26.8	− 35	− 31	− 5	− 10	+ 16	− 10	+ 26	− 2	+ 22	− 10
Non-Stick Cooking Products, Aerosol	40.2	+ 16	− 19	+ 15	+ 6	+ 9	− 21	+ 3	+ 2	+ 2	− 46
Salt (HU)	8.9	− 35	− 43	− 20	− 14	− 24	− 25	+ 9	− 1	+ 87	+ 49
Salt Substitute	23.7	+ 3	− 18	+ 3	− 16	− 1	− 14	− 5	+ 7	+ 18	+ 10
Seasonings/Spices (HU)	11.7	+ 9	− 13	—	− 32	+ 32	− 18	+ 23	− 7	− 11	− 8

(HU) = Heavy Users

Those who are below average in salt consumption share the demographic pattern of being above average in income. Only the two lowest-income sectors, Groups 9 and 10 show dramatically high patterns of salt consumption. Allocation of shelf space of seasonings and spices needs to be most generous in stores located where young above-average income Group 5 families are prevalent. The poorest potential for all these product categories is among the urban professionals of Group 2.

WINE (BASE = ADULTS)	PERCENT WHO USE (1989)	USE BY GEODEMOGRAPHIC GROUP (+/− % VS. TOTAL U.S.) 1	2	3	4	5	6	7	8	9	10
+ Average −		+ 53	+ 38	+ 9	+ 18	+ 4	− 11	− 17	− 19	− 51	+ 31
Wine & Spirits Coolers	19.4	+ 19	+ 1	+ 8	− 5	+ 10	+ 4	+ 4	− 14	− 17	− 14
Wine, Domestic Dinner/Table	25.9	+ 55	+ 42	+ 20	+ 19	+ 13	+ 1	− 22	− 18	− 58	− 17
Wine, Imported Dinner/Table	10.8	+ 51	+ 52	+ 22	+ 21	+ 19	− 1	− 34	− 20	− 56	− 5
Wine, Aperitif, Specialty	1.0	+ 104	+ 63	− 29	+ 45	− 11	− 16	− 2	− 34	− 88	+ 76
Wine, Dessert/Port/Sherry	4.9	+ 57	+ 48	+ 25	+ 25	− 14	− 10	− 37	− 20	− 45	+ 45
Wine, Party/Pop/Sangria	1.4	− 1	+ 43	− 5	− 35	+ 6	− 31	+ 13	− 3	− 39	+ 114
Wine, Sparkling/Cold Duck/ Champagne	13.4	+ 44	+ 43	+ 19	+ 10	+ 14	− 12	− 15	− 14	− 53	− 1
Vermouth	3.4	+ 92	+ 10	+ 12	+ 60	− 7	− 26	− 42	− 27	− 54	+ 48

Supermarkets operating in areas defined by either Group 1 or Group 2 have the opportunity to capitalize on a well-developed taste for wine (assuming, of course, that local licensing laws allow them to stock wine at all). These affluent and well-educated consumers show the highest rates of usage for both imported and domestic table wines, and also demonstrate an appreciation for champagne.

Stores in blue-collar areas, as typified by Groups 7 and 9, can expect the wine to flow at a much more sluggish rate. The typically suburban areas of Groups 3 and 5 show an interest in consuming coolers.

1. High education, very high income, suburban professionals
2. Urban, mobile professionals, high income
3. High income, homeowners, white-collar families
4. High income, older, white-collar workers
5. Younger, high mobility, high income
6. Younger, mobile, low income, few children
7. Average income, blue-collar families, rural
8. Low income, older, few children
9. Low education, low income, rural, blue-collar workers
10. Very low income, urban, blacks, apartment dwellers

Note: For a full description of these groups, see pages 22-23.

Source: Mediamark Research, Inc. and ClusterPLUS

DRY GROCERY (NONFOOD)

HOUSEHOLD CLEANERS (BASE = FEMALE HOMEMAKERS)	PERCENT WHO USE (1989)	USE BY GEODEMOGRAPHIC GROUP (+/− % VS. TOTAL U.S.) 1	2	3	4	5	6	7	8	9	10
+ Average −		− 3	− 18	+ 6	+ 2	+ 1	− 17	+ 12	− 4	+ 11	− 2
Carpet Cleaners (H)	8.8	− 21	− 39	+ 3	− 24	− 18	− 20	+ 39	− 3	+ 24	+ 29
Drain Cleaners	39.2	− 1	− 7	+ 6	+ 5	− 4	− 7	+ 5	—	+ 3	− 9
Floor/wax polish	34.5	− 9	− 9	+ 1	+ 1	+ 3	—	+ 6	+ 16	− 14	+ 12
Household Cleaners (H)	21.5	—	− 24	+ 9	+ 10	+ 17	− 22	+ 9	− 3	+ 1	− 28
Furniture Polish (H)	19.6	− 3	− 13	+ 9	− 14	+ 10	− 32	+ 31	+ 5	+ 6	− 44
Toilet bowl cleaners, in-bowl	53.1	− 8	− 22	+ 7	+ 1	+ 3	− 12	− 2	+ 1	+ 15	—
Toilet bowl cleaners, in-tank	37.6	− 13	− 21	+ 5	− 2	− 7	− 3	+ 7	− 5	+ 21	+ 3
Metal polish	23.3	+ 40	+ 2	+ 17	+ 21	+ 3	− 19	− 12	− 10	− 17	− 17
Oven cleaners	39.7	− 9	− 13	− 4	− 5	+ 2	− 5	+ 8	− 5	+ 10	+ 20
Scouring pads (H)	12.1	− 8	− 5	+ 11	+ 2	− 13	− 44	+ 20	+ 7	+ 12	+ 3
Scouring Powder (H)	9.5	− 17	− 44	− 20	− 14	− 4	− 12	+ 24	+ 5	+ 25	+ 28
Glass cleaners (H)	16.1	+ 11	− 21	+ 27	− 10	+ 20	− 29	+ 4	− 18	+ 14	− 23

(HU) – Heavy Users

Use of household cleaners by the various geodemographic groups is, well, spotty. Each group has some favorite types of cleaners while showing relative disdain of others. This underlines the need for every store to modulate their settings in this department to reflect neighborhood demands.

The affluent suburban professionals of Group 1 provide a good example. They are avid metal polishers (probably lots of silver and brass on the premises) and glass cleaners (all those mirrors and windows in those big houses). But their usage of other cleaners is lackluster— particularly carpet cleaners, for which they can afford to call in professionals.

For the blue-collar, rural families of Group 7, however, carpet cleaners are an important category (usage 39% above average) along with such traditional basics as furniture polish (+ 31%), scouring pads (+ 20%) and scouring powder (+ 24%).

Usage of toilet bowl cleaners of both types is highest among the low income, rural blue-collar member of Group 9.

HOUSEHOLD SUPPLIES (BASE = FEMALE HOMEMAKERS)	PERCENT WHO USE (1989)	USE BY GEODEMOGRAPHIC GROUP (+/− % VS. TOTAL U.S.) 1	2	3	4	5	6	7	8	9	10
+ Average −		+ 6	− 14	+ 6	− 3	+ 12	− 18	+ 8	− 3	+ 3	− 18
Charcoal (HU)	10.9	+ 23	− 20	− 7	− 9	+ 30	− 7	+ 11	− 14	− 12	− 13
Tape, Transparent (HU)	20.2	+ 17	− 13	+ 11	+ 7	+ 32	− 32	+ 18	− 8	− 12	− 58
Insecticide, Indoor (HU)	8.4	− 8	− 21	− 7	− 22	—	− 10	+ 14	+ 8	+ 2	+ 35
Insect Repellents	27.9	− 5	− 26	+ 6	− 7	+ 20	− 23	+ 11	− 1	+ 16	− 32
Light Bulbs (HU)	15.9	+ 25	+ 1	+ 7	− 2	+ 22	− 29	+ 15	− 1	− 22	− 41
Insecticides, Outdoor	26.0	+ 8	− 21	+ 12	+ 19	+ 11	− 37	− 1	− 1	+ 17	− 39
Rubber Gloves	30.6	+ 24	+ 19	+ 17	− 2	+ 5	− 10	− 13	− 10	− 13	+ 4
Air Freshener Sprays/Room Deodorants (HU)	12.5	− 12	− 22	− 4	− 7	− 7	− 5	+ 5	+ 1	+ 9	+ 42
Canning Jars/Lids	23.2	− 18	− 36	+ 17	− 2	− 2	− 11	+ 16	− 2	+ 39	− 61

(HU) – Heavy Users

The terraces and backyards of suburban Groups 1 and 5 seem to lend themselves to frequent barbecues, judging from the high usage rates of charcoal by these groups. While they're out there waiting for the steaks to char, many bring along some outdoor insecticides to ward off unwelcome visitors, suggesting some cross-merchandising possibilities.

Indoor insecticides are in greater demand by the urban low-income blacks who compose Group 10, who also show the highest rate of usage (42% above average) of air fresheners and room deodorants.

Transparent tape can be expected to sell best in stores located in higher-income neighborhoods.

1. High education, very high income, suburban professionals
2. Urban, mobile professionals, high income
3. High income, homeowners, white-collar families
4. High income, older, white-collar workers
5. Younger, high mobility, high income
6. Younger, mobile, low income, few children
7. Average income, blue-collar families, rural
8. Low income, older, few children
9. Low education, low income, rural, blue-collar workers
10. Very low income, urban, blacks, apartment dwellers

Note: For a full description of these groups, see pages 22-23.

Source: Mediamark Research, Inc. and ClusterPLUS

LAUNDRY SUPPLIES (BASE = FEMALE HOMEMAKERS)	PERCENT WHO USE (1989)	USE BY GEODEMOGRAPHIC GROUP (+/− % VS. TOTAL U.S.) 1	2	3	4	5	6	7	8	9	10
	+ Average −	− 5	− 32	+ 2	− 5	+ 23	− 26	+ 9	− 1	+ 15	− 14
Bleach (HU)	21.7	− 13	− 36	− 1	− 12	+ 18	− 30	+ 23	− 2	+ 30	− 27
Fabric Softener (HU)	18.1	− 16	− 55	− 3	− 1	+ 55	− 39	+ 20	+ 6	+ 2	− 41
Detergent/Soap, Regular Laundry (HU)	25.3	− 11	− 49	+ 6	− 6	+ 40	− 38	+ 18	—	+ 20	− 50
Detergent/Soap, Fine Fabrics (HU)	10.8	− 9	− 23	− 3	− 10	− 1	− 25	− 7	+ 6	+ 17	+ 59
Starch	32.0	+ 7	− 13	+ 2	− 9	+ 9	− 15	− 7	− 12	+ 27	+ 10
Laundry Pre-Treatments/ Pre-Cleaners	49.2	+ 11	− 13	+ 8	+ 8	+ 15	− 10	+ 6	− 5	− 7	− 34

(HU) = Heavy Users

The busiest home laundries can be found in the homes of the young families of Group 5. The fact that 52.5% of these households have one or more children on the premises—the highest rate of the 10 groups—helps to explain this. Their usage of the two department basics, detergents for regular laundry and fabric softeners is the highest of any group.

Those living in urban areas, whether affluent (Group 2) of low income (Group 10) are low in their usage of laundry products, probably because their apartments lack the room for these appliances.

PAPER/PLASTIC PRODUCTS (BASE = FEMALE HOMEMAKERS)	PERCENT WHO USE (1989)	USE BY GEODEMOGRAPHIC GROUP (+/− % VS. TOTAL U.S.) 1	2	3	4	5	6	7	8	9	10
	+ Average −	+ 2	− 18	+ 9	− 1	+ 13	− 18	+ 8	− 5	0	− 12
Aluminum Foil (HU)	11.9	− 10	− 24	+ 7	− 19	+ 18	− 40	+ 15	− 3	+ 7	+ 31
Diapers, Disposable	12.5	− 16	− 35	− 21	− 21	+ 18	+ 12	+ 32	− 13	+ 14	− 7
Household Wipes, Disposable	16.1	+ 25	− 2	+ 12	+ 2	+ 2	− 19	− 12	− 9	− 2	+ 17
Cups, Disposable	34.5	+ 8	− 13	+ 14	—	+ 11	− 26	+ 6	− 12	+ 6	− 5
Plates, Disposable	52.5	—	− 22	+ 10	—	+ 7	− 34	+ 12	− 1	+ 3	− 27
Facial Tissue (HU)	26.7	+ 20	− 11	+ 30	+ 13	+ 11	− 36	− 5	− 5	− 15	− 13
Oven Cooking Bags	15.0	− 18	− 37	+ 9	− 6	+ 27	− 2	+ 12	− 17	+ 10	− 8
Paper Napkins	74.5	+ 13	− 1	+ 9	+ 11	+ 6	− 9	− 2	− 3	− 14	− 13
Paper Towels (HU)	22.5	− 2	− 13	+ 15	− 2	+ 15	− 25	—	—	+ 3	− 6
Plastic Kitchen Wrap (HU)	18.0	+ 7	− 14	+ 14	+ 3	+ 10	− 35	+ 8	+ 7	− 1	− 30
Plastic Sandwich/Food Storage/Freezer Bags (HU)	14.6	− 3	− 30	+ 26	− 5	+ 21	− 31	+ 4	—	—	− 17
Plastic Garbage Bags/Trash Can Liners (HU)	43.7	+ 2	− 10	+ 5	+ 1	+ 8	− 9	+ 13	+ 1	− 7	− 26
Cleaning Wipes, Pre-Moistened	16.2	+ 2	− 26	− 4	+ 2	+ 19	+ 3	+ 23	− 14	− 7	− 27
Toilet Paper (HU)	35.6	− 5	− 17	+ 5	− 6	+ 19	− 7	+ 13	− 6	− 1	− 21
Waxed Paper	53.4	+ 11	− 10	+ 8	+ 15	—	− 15	− 1	− 5	+ 9	− 25

(HU) = Heavy Users

The young families of Group 5, with lots of children and above-average income, are prime customers for a wide range of paper and plastic products, including such department stalwarts as paper towels (15% above average) and toilet paper (+19%).

Disposable diapers also do well with Group 5, as they do with the rural blue-collar families of Group 7 (32% above average). Stores located in the areas populated by affluent professionals, however, can devote a smaller proportion of their paper section to diapers. In the case of the affluent suburban professionals of Group 1, the space might well be allocated to the facial tissues, paper napkins, disposable household wipes and disposable cups they like to stock up on.

Waxed paper usage skews toward higher income areas, probably because of their greater use of this product in microwave ovens. Waxed paper is just one of several product categories in this department that have low usage among the low-income, urban blacks of Group 10. An exception is aluminum foil, for which they show usage 31% above the national average.

1. High education, very high income, suburban professionals
2. Urban, mobile professionals, high income
3. High income, homeowners, white-collar families
4. High income, older, white-collar workers
5. Younger, high mobility, high income
6. Younger, mobile, low income, few children
7. Average income, blue-collar families, rural
8. Low income, older, few children
9. Low education, low income, rural, blue-collar workers
10. Very low income, urban, blacks, apartment dwellers

Note: For a full description of these groups, see pages 22-23.

Source: Mediamark Research, Inc. and ClusterPLUS

TARGETING YOUR TRADING AREA

PET PRODUCTS (BASE = FEMALE HOMEMAKERS)	PERCENT WHO USE (1989)	USE BY GEODEMOGRAPHIC GROUP (+/− % VS. TOTAL U.S.) 1	2	3	4	5	6	7	8	9	10
+ Average −		+12	−10	+8	−8	+13	−5	+17	−7	−10	−35
Cat Food, Canned	14.0	+34	+7	−2	+4	−3	+15	+29	−27	−33	−13
Cat Food, Dry	21.6	+11	−19	−3	−23	+6	+5	+32	−11	+3	−36
Cat Food, Moist	7.6	+30	+29	−10	−5	−5	−3	+10	+5	−17	−30
Dog Food, Canned	14.6	+1	−36	+35	−10	+18	−26	+8	−5	+6	−39
Dog Food, Dry	27.8	—	−45	+16	−17	+26	−25	+20	−4	+19	−54
Dog Food, Moist	5.7	−5	−9	+7	−7	+22	−29	+19	+9	−8	−37
Cat Litter	16.2	+17	+19	+8	−3	+12	+11	+15	−15	−26	−38
Dog Biscuits/Treats	19.3	+31	−40	+27	−2	+30	−28	+10	+1	−35	−45
Flea/Tick Care Products	20.2	−1	−35	+5	−10	+14	−6	+18	+4	−3	−31
Cat Treats	8.4	+2	+28	−6	−8	+12	+35	+8	−24	−4	−28

(HU) = Heavy Users

All types of dog food, dog biscuits and treats show heaviest usage among the young, above-average-income families of Group 5 and the blue-collar rural families of Group 7. The older, white-collar workers of Group 4, many of whom live in the central city, show little commitment to man's best friend.

Cats often reside with the wealthy suburban professionals of Group 1, who are heavy buyers of all three types of cat food as well as cat litter. Many cats share homes with dogs in Group 7 households, making this group the overall best customers for pet products departments. At the other end of the spectrum, pet ownership and demand for pet products is least evident among the low-income, urban blacks of Group 10.

SOAPS, NON-LAUNDRY (BASE = FEMALE HOMEMAKERS)	PERCENT WHO USE (1989)	USE BY GEODEMOGRAPHIC GROUP (+/− % VS. TOTAL U.S.) 1	2	3	4	5	6	7	8	9	10
+ Average −		+2	−13	+13	−2	+13	−15	+12	−2	+4	−45
Automatic Dishwashing Detergent	45.2	+62	−4	+19	+7	+45	−23	−9	−23	−32	−53
Dishwashing Detergent, Liquid (HU)	9.6	−42	−16	−11	−7	−16	−5	+36	+22	+34	−54
Hand Cleaners, Heavy Duty (HU)	17.3	−15	−18	+31	−7	+10	−18	+9	−6	+10	−28

(HU) = Heavy Users

A tradeoff is apparent between the use of automatic dishwashing detergents and liquid dishwashing detergents. The suburban affluents of Group 1 have a dishwasher to do their work and therefore skimp on usage of the liquid detergents used for washing of dishes by hand. The older, below-average-income members of Group 8, however, show the opposite pattern. The number of brands and sizes offered by a particular store can profitably be altered by reference to this type of data.

TOBACCO	PERCENT WHO USE (1989)	USE BY GEODEMOGRAPHIC GROUP (+/− % VS. TOTAL U.S.) 1	2	3	4	5	6	7	8	9	10
+ Average −		−41	−20	−10	−19	+2	+2	+12	+3	+40	+13
Cigarettes* (HU)	10.6	−31	−21	−16	−22	+8	−23	+19	+20	+35	−10
Cigarillos/Little Cigars*	1.6	−53	−38	−30	−12	+31	−5	+56	−25	+42	−6
Cigars**	4.3	−45	+19	+24	−11	−2	+18	−17	−21	+18	+53
Chewing & Smokeless Tobacco**	5.3	−77	−55	−15	−37	−24	−30	+32	+20	+143	−28

(HU) = Heavy Users
*Adults
**Men

The highest rate of cigarette consumption is found in areas with Group 9 characteristics (less educated, low income, rural blue-collar workers). Their rate of heavy usage is 35% above the national average. Many live in the South, and the rate of blacks living there is more than twice the national average. This group's usage of all other tobacco product categories is also high.

Cigars find some fans among the higher income inhabitants of Groups 2 and 3 with some support coming from lower-income Groups 9 and 10.

1. High education, very high income, suburban professionals
2. Urban, mobile professionals, high income
3. High income, homeowners, white-collar families
4. High income, older, white-collar workers
5. Younger, high mobility, high income
6. Younger, mobile, low income, few children
7. Average income, blue-collar families, rural
8. Low income, older, few children
9. Low education, low income, rural, blue-collar workers
10. Very low income, urban, blacks, apartment dwellers

Note: For a full description of these groups, see pages 22-23.

Source: Mediamark Research, Inc. and ClusterPLUS

TOBACCO	PERCENT WHO USE (1989)	USE BY GEODEMOGRAPHIC GROUP (+/− % VS. TOTAL U.S.) 1	2	3	4	5	6	7	8	9	10
Disposable Lighters* (HU)	11.1	−35	−18	−21	−31	—	+ 2	+ 9	+14	+45	+18
Pipe Tobacco**	5.9	−11	−41	−11	+13	− 9	−11	−14	+18	+43	− 9
Cigarette Rolling Paper*	3.4	−35	+10	+ 2	−29	+11	+63	− 4	− 8	−44	+73

(HU) = Heavy Users *Adults **Men

FROZEN FOOD

FROZEN FOOD (BASE = HOMEMAKERS)	PERCENT WHO USE (1989)	USE BY GEODEMOGRAPHIC GROUP (+/− % VS. TOTAL U.S.) 1	2	3	4	5	6	7	8	9	10
+ Average −		+ 4	−19	+ 8	− 5	+19	−12	+ 6	− 5	− 3	−14
Chicken, Breaded	23.0	− 3	−16	+ 4	−13	+13	− 7	+23	− 5	− 4	−19
Desserts (HU)	9.3	+ 9	−15	+ 9	−16	+27	−19	− 1	− 1	− 5	− 9
Dinners (HU)	11.6	− 8	− 9	+ 4	—	+12	—	+ 1	+ 9	+ 4	−44
Dough Products (HU) (incl. refrig.)	10.1	−37	−57	− 7	−32	−18	−16	+28	− 1	+67	+31
French Toast/Pancakes	17.8	− 1	− 9	+ 7	− 2	+37	+ 7	− 9	−17	−16	+ 7
Corn on the Cob	26.5	+ 4	− 4	− 5	−16	+27	− 6	+ 5	−16	− 3	+20
Main Courses/Entrees (HU)	12.3	+20	− 1	+25	+ 8	+28	+16	− 7	−22	−30	−40
Pizza (HU)	13.1	−10	−46	+ 5	−19	+ 9	−12	+22	+ 3	+22	−32
Potato Products (HU)	11.8	−26	−59	—	−16	+26	−28	+22	—	+33	−14
Orange Juice (HU)	10.3	+ 6	− 6	− 8	−13	+25	−17	+13	+ 6	−18	− 6
Seafood (HU)	12.2	+ 4	−16	+ 3	+ 2	+20	−26	+ 7	− 6	− 3	—
Vegetables, Plain (HU)	10.8	+45	− 7	+38	+ 7	+24	−34	−13	−15	−25	−27
Vegetables, Prepared (HU)	13.5	+22	− 6	+20	+21	+19	−27	−13	+ 3	−32	−10
Waffles	32.1	+14	− 7	+ 9	+17	+30	−10	+ 4	−15	−35	−11
Yogurt	11.7	+31	−10	+12	−17	− 4	+ 3	− 7	− 7	− 2	+ 2
Breakfast	4.3	+21	− 8	+12	+35	+ 8	−17	+ 5	− 5	−16	−58
Ice Cream/Sherbert/ Ice Milk (HU)	19.1	−16	−33	—	+ 6	—	−19	+22	+ 2	+11	− 9
Ice Cream Novelties (HU)	8.5	− 9	−32	+23	−39	+40	−25	+ 1	+ 2	+ 2	—

(HU) = Heavy Users

1. High education, very high income, suburban professionals
2. Urban, mobile professionals, high income
3. High income, homeowners, white-collar families
4. High income, older, white-collar workers
5. Younger, high mobility, high income
6. Younger, mobile, low income, few children
7. Average income, blue-collar families, rural
8. Low income, older, few children
9. Low education, low income, rural, blue-collar workers
10. Very low income, urban, blacks, apartment dwellers

Note: For a full description of these groups, see pages 22-23.

The most consistently high rate of usage of frozen products can be found in Group 5, the young families with children living in the suburbs. Lots of freezer space is needed to accommodate their taste for such frozen staples as main courses and entrees (28% above average) and ice cream novelties (+40%).

Among affluent professionals, those living in the city (Group 2) show little interest in frozens, but their city cousins can be counted on to stock up on main courses and entrees, as well as both plain and prepared vegetables.

Both frozen pizza and frozen potato products evoke lukewarm interest among higher-income groups, but a stampede to the frozen section by Group 7 (blue-collar rural families) and Group 9 (similar, but with much lower income). But in the very lowest income group (Group 10's low-income urban blacks) almost all categories show below-average consumption, perhaps related to a lack of adequate in-home freezer space.

The younger, below-average-income members of Group 6 are one of the least likely to have children in the household, which helps to explain their low consumption of both ice cream and ice cream novelties. The category of most interest to them is main courses and entrees.

Source: Mediamark Research, Inc. and ClusterPLUS

instore BUSINESS

EIGHTH ANNUAL OPERATIONS REVIEW

SERVICE DELI REVIEW

Has the supermarket service deli reached a crossroads? The results of the annual review of the department's operations review shows that continued growth will only come by facing tough challenges.

BY DAVID LITWAK AND JANET TORRES CEPEDA

When a new concept is successful, it seems to have unlimited potential. And as growth begins to soar, so do expectations.

To those who nourished it through the early years, the new concept brings rewards in the form of extra sales, more profits, additional customers, and the development of offshoot services.

But inevitably, the time comes when the concept can no longer maintain its spectacular ascent. Growth is still there, but the soaring growth has abated, and some of the initial enthusiasm has faded.

The service deli may just be reaching this point. In 1989, it still showed double-digit growth in sales, as it has for several years— but the rate of growth has begun to decline.

If delis are to continue their previously fast growth, changes in the concept need to contemplated. It is important that the department's past successes not cloud retailers' vision of its future direction.

Growth still double-digit

Service delis continue to exhibit solid growth in sales. The increase in 1989 was 16.5 percent.

This, however, is about 21 percent less than the 20.7 percent sales growth that the department had in 1988.

Part of the reason that growth slowed somewhat in 1989 was a drop in the number of new deli units coming into the industry.

Last year about 500 delis opened in supermarkets, bringing the total number of deli units in operation to 20,200. This amounts to units in about 65.4 percent of all supermarkets. In 1988 there were 900 new deli units in operation. With 400 fewer new units open, the percentage increase in total sales suffered.

The drop in the number of new service deli departments opening last year points to the strong possibility that deli construction may have passed its peak.

Store construction in general has slowed in many areas of the country. Two-thirds of the stores already have delis, so there is no room to support the opening of hundreds of new supermarket delis each year. Operators will have to concentrate on getting more sales out of the delis that they currently run.

Service deli sales are really an amalgam of different sales, more or less controlled by the service deli. Some retail organizations sell items such as pizza, hot entrees, refrigerated entrees and salads right out of the deli, while others have begun to separate out these services, both in physical location and in management responsibility.

Other services, such as sushi bars, cafes, snack bars, catering, self-service yogurt, can also be under the purview of the deli department. We certainly have come a long way from the original meaning of the old term "Delicatessen."

Adding up the money brought i . by all these activities, the service deli had sales last year that reached $11.13 billion. This was an increase of about $1.5 billion.

Retailers have managed to increase the amount of sales dollars that each of their existing service delis brings into the store. Average weekly sales for a deli department rose last year to an all-time high of $10,600. This was an increase of 13.6 percent over the 1988 average of $9,352.

The combination of an additional 500 deli units, and an increase in average sales of 13.6 percent, fueled last year's 16.5 percent total sales growth.

As the number of new units declines each year, the total department growth rate should continue to decline, although real growth at individual units may continue to do extremely well. And after all, real sales growth of a unit is what really matters, since you can't

CENSUS 3A
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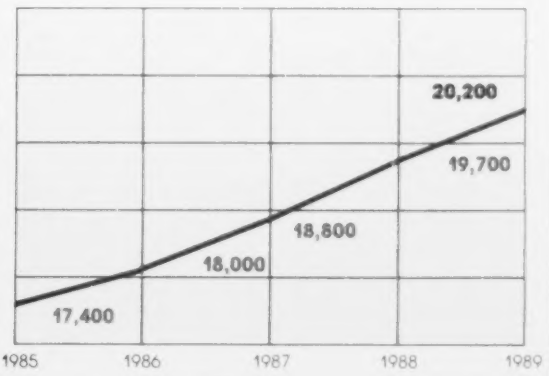
DELI CENSUS

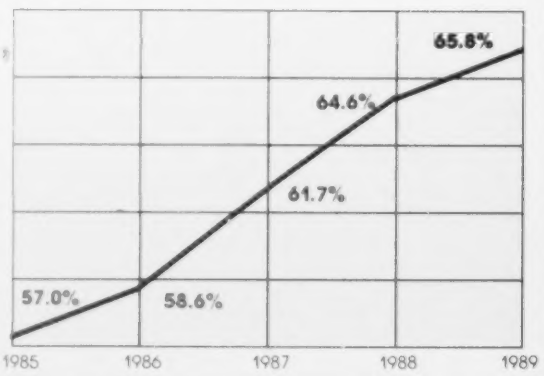
The number of service delis operating in our nation's supermarkets has swelled to 20,200, bringing departmental sales to over $11 billion.

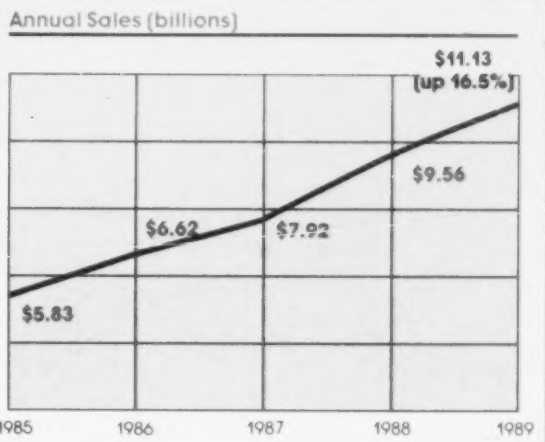
Sales were on the rise again last year in the service deli. Fueled by the opening of approximately 500 new deli units, the overall 1989 sales increase was 16.5%.

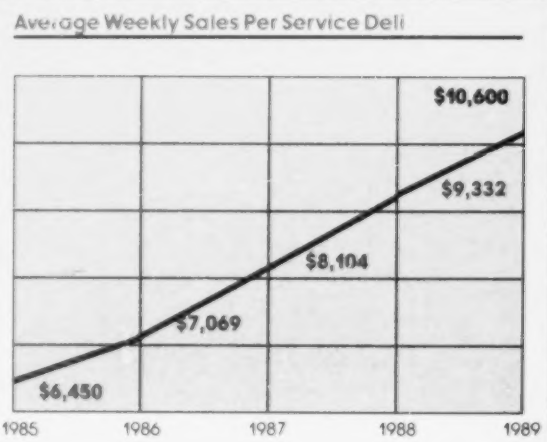
Growth in both the number of operating deli units and total deli sales has slowed somewhat from the stellar pace of 1988. While sales are still far from leveling off, delis will have a hard time maintaining the high growth levels of the 1980s.

Weekly sales per deli rose 13.6% in 1989. On average, each deli sold about $10,600 worth of product through its various sections. Superstores and super warehouse stores sold almost twice as much product as conventional units.









take the statistical concept of "total sales growth" to the bank.

Industry-wide success

The vast majority (89 percent) of deli operators report an increase in sales at delis run by their companies, while only 3 percent found their deli units to be bringing in less money than in the previous year. On a company-wide basis, the average increase reported by retailers in units that have been operating for at least two years was 11.1 percent.

This shows that the growth in deli unit sales is evenly spread among the whole industry; it is not the case that part of the industry has large sales gains in their delis, while another segment has large declines. The deli concept, therefore, is still working successfully for virtually all operators using it.

While larger stores sell more in terms of total dollars, deli sales may be more important to smaller stores. The deli in a superstore sells an average of $14,200 per week, while the average super warehouse store sells $14,900 a week at its deli, accounting for 4.08 percent and 2.72 percent of their respective total store sales.

The average conventional store deli, on the other hand, brings in only $7,821 a week, but this accounts for 5.5 percent of total store sales. The deli becomes central to the product mix of the conventional store, and its impact on drawing in customers from the competition makes the deli an extremely important department to the smaller store.

Profits are up slightly for delis. Last year the average service deli contributed 14.7 percent of the profits to the store it was in. This was up slightly from 14.3 percent the year before.

The ratio of percent of store profits to percent of store sales for the deli is over 3 to 1. No wonder the incentive to get deli sales up is so strong!

The gross margin achieved by the service deli averages 43.2 percent, down slightly from 44.6 percent the previous year. This probably just reflects adjustments in products and prices, rather than indicating a downward trend.

New products carve up the pie

Almost two-thirds (63.3 percent) of service deli sales are

DELI SALES, MARGINS & PRODUCT MIX

An increase in deli dollar sales equals more bankable profits for the store. This equation, like any true mathematical principle, has never varied.

Deli department sales were up in 89% of the units operating last year. The average increase was approximately 11%. This is good news for operators, since deli sales bring in almost 15% of the net profit of the stores in which they operate.

A gross margin of more than 43% helped keep the profitability of the department high. Products that are gaining popularity in the service deli, such as hot and refrigerated entrees, pizza, sandwiches and other prepared foods, should keep deli profits up, since their margins are generally higher than those of traditional deli products.

Deli operators have been very good at keeping up with the consumer the past few years. In 1989, those products that increased in sales or that were introduced into delis the most frequently were those that reflected consumer tastes, lifestyles, or health interest. Among these were refrigerated entrees, low sodium products, soft-serve yogurt, and low fat products.

Average Weekly Sales

Mean **$10,600** Median **$9,700**

By Store Format

Conventional	**$7,821**
Super Store	**$14,200**
Superwarehouse	**$14,900**

Change in Dollar Sales

(1988 vs. 1987)

Higher	**89%**
No change	**8**
Lower	**3**
Total	**100%**
Average reported increase	**11.1%**

Share of Total Store Sales

Mean **4.5%** Median **4.1%**

By Store Format

Conventional	**5.13%**
Super Store	**4.08**
Superwarehouse	**2.77**

Contribution to Store Profits

Mean **14.7%** Median **15.7%**

Percent of Store Profits

Less than 8.0%	**6%**
8.0 - 9.9	**11**
10.0 - 11.9	**22**
12.0 - 14.9	**33**
15.0 or more	**38**
Total	**100%**

Do You Consider Your Delis

Image/traffic builders	**3%**
Profit centers	**12**
Both	**85**
Total	**100%**

Gross Margin

Mean	**43.2%**
Median	**41.2%**
Less than 35%	**9%**
35 - 39	**26**
40 - 44	**37**
45 - 49	**15**
50 or more	**13**
Total	**100%**

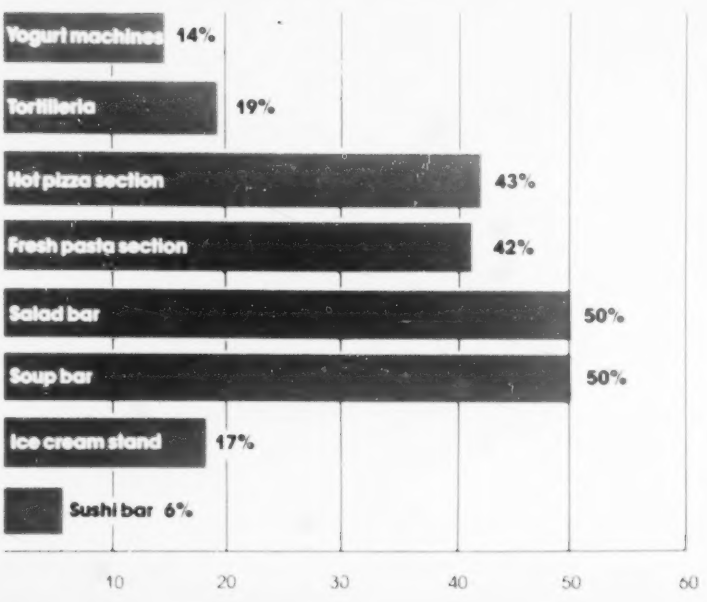
Service Deli Items Lines Most Frequently Added or Increased

- Refrigerated entrees
- Soft yogurt
- Low fat products
- Low-sodium products

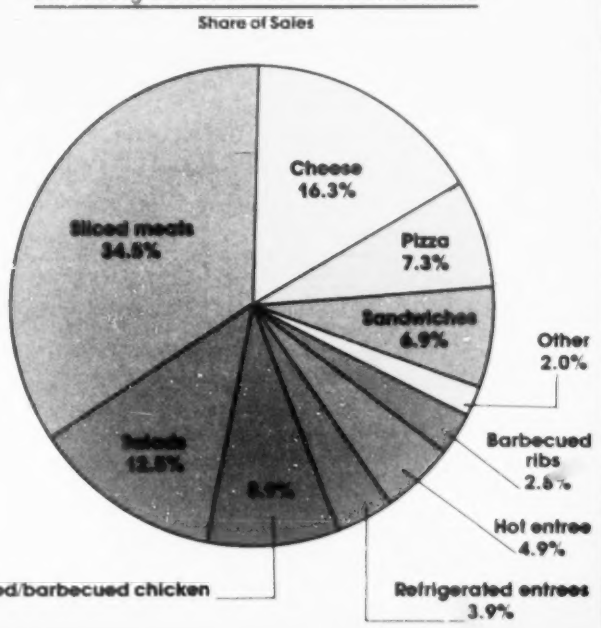
Items Dropped or Decreased

- Hot entrees
- Variety lunch meats

Percent of Companies Offering Each Type of Product Section as Part of Service Deli



Portioning Out the Service Deli Sales Dollar



DELI SPACE

As a percentage of total store space, delis are shrinking. But they now pack more wallop per square foot, when it comes to bringing in the bucks.

While the average deli has increased its size slightly (to 1,410 sq. ft.), its size has not quite kept pace with increases in the size of the total store. The percentage of total store space occupied by the deli has declined to an average of just 3.8%, down from 4.1% in 1988. This decline occurred in all types of store formats. The biggest decrease was in superstores, which declined from 4.9% to 4.6% in the past year.

The deli has become better at profitably using the floor space that it has. Over the past year, the average deli had sales of $7.52 per sq. ft. per week. This represented an increase of $.59 per foot over the previous year. Since more sales from each square foot is the goal of merchandising in any retail organization, delis are making merchandisers very happy.

Size of Department

Square Feet of Space	
Mean	1,410 Square Feet
Median	1,225 Square Feet
By Store Format	
Conventional	1,005 Sq. Ft.
Super Store	2,090 Sq. Ft.
Superwarehouse	2,045 Sq. Ft.

Share of Total Store Space	
Mean	3.8%
Median	3.4%
By Store Format	
Conventional	4.1%
Super Store	4.6
Superwarehouse	3.1%

The Delibake Concept

Stores Combining Delis and Bakeries into a Joint Delibake Department	
Joint delibake	26%
Separate departments	74
Total	100%

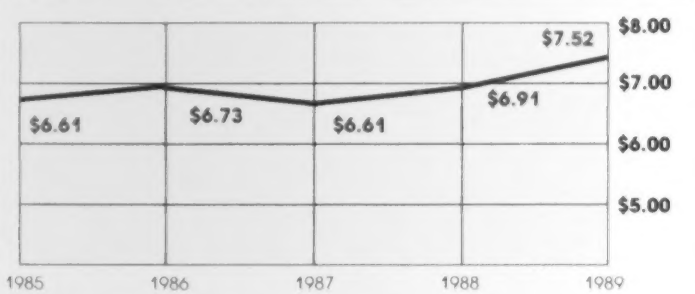
Popularity of Display Case Styles

Percent Likely to Use in Upcoming Installations	
European-style cases	68%
Traditional cases	30
Both	2
Total	100%

Average Weekly Sales Per Square Foot of Space

Mean	$7.52
By Store Format	
Conventional	$7.78
Super Store	6.80
Superwarehouse	7.29

Average Weekly Sales Per Square Foot of Space



accounted for by the traditional deli products, sliced meats, cheeses and salads. For an increasing number of these items, service deli sales include self-service, especially wrapped cheeses and vacuum-packed meats.

These self-service items, along with refrigerated self-service entrees, seem to be the wave of the future. Fifty-seven percent of the retailers indicated that they believe that their operations will be moving toward more self-service in the future.

This further emphasizes the convenience aspect of the deli, which is one of the department's strongest merchandising and marketing attributes. Delis' reputations have traditionally been built on quality and service; but of late, they are being driven by convenience.

Prepared foods continue to make significant gains in their portion of the deli sales dollar. For instance, prepared entrees now account for 8.8 percent of sales, a significant increase over last year's 7.1 percent.

This is the first year that hot and cold entrees were separately tracked. The slightly bigger share of the pie still goes to entrees that are sold hot. These account for 4.9 percent of all deli sales, while sales of refrigerated entrees reached 3.9 percent of the total.

Indications are that refrigerated entrees will increase at a much faster rate than hot entrees. Retailers indicated that hot entrees were among the most decreased or dropped deli products last year, while refrigerated entrees were among the most increased.

Other prepared foods also hold a significant share of deli sales. Pizza (7.3 percent), sandwiches (6.9 percent), barbecued ribs (2.8 percent) and barbecued/fried chicken (8.9 percent) all had slight increases in their share of sales during the past year.

Low-sodium and low-fat products were also among those products most often added or increased in the deli. The deli section is the area of the store that can respond the fastest to consumer trends and needs.

Frequently this is due to senior management giving deli directors more leeway to incorporate changes, and to some degree circumvent the usual procedures for getting needed products into their cases. If any area of the store can take in a product without the appropri-

DELI LOCATION & EQUIPMENT

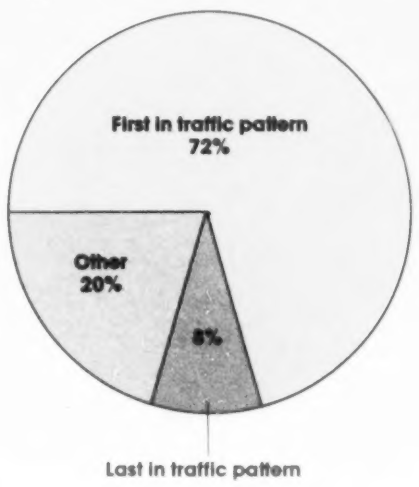
In addition to the basics, the well-equipped deli will be wearing the latest in convenience foodservice equipment this year.

To operate, a deli needs slicers, walk-in refrigerators, random weight scales, oven and fryers. It seems that virtually every deli has at least one of each of these.

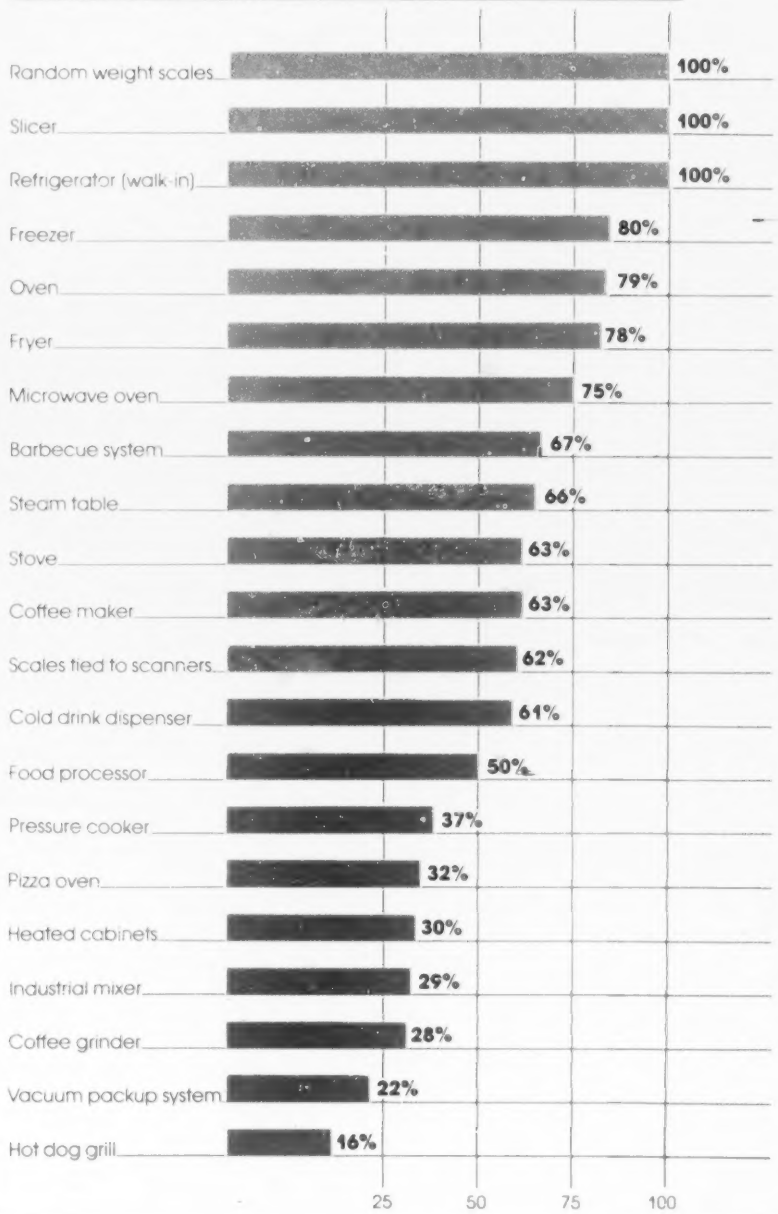
The latest craze in deli equipment seems to be the adoption of more paraphernalia that can be used in providing fast food to hungry consumers. More and more delis have installed microwave ovens (75%), barbecue systems (67%), coffee makers (63%), cold drink dispensers (61%), pizza ovens (32%) and hot dog grills (16%).

What the majority (72%) of deli operators would like to do with their store's traffic patterns is to put the deli first. An additional 20% want the deli in the middle of the store.

Preferred Location for Service Deli



The Well-Equipped Service Deli Percent of Stores That Have



ate allowances being met, it is apt to be the deli.

Retailers have been quick to experiment with many different sections and product lines in their thirst to boost deli-related sales.

Yogurt machines, tortillerias, sushi bars, ice cream, pizza and fresh pasta sections are all offered in many many units. Salad bars and hot soup are being offered by about half the companies that operate delis.

Add to these the snack bars, wokeries, restaurants and catering, and you have a lot of different kinds of products and services fighting for a share of the deli dollar, and for the attention of the deli employee and the department's management.

Sometimes there may not be enough of that management attention to adequately go around. That is when the department can run into trouble, and there is the potential for slippage of the image across the whole department. One poorly done departmental section can undo a lot of the good things done by the rest of the department in the eyes of the consumer.

Labor looking better

Deli labor statistics are encouraging. On average, delis are employing more people, but are also using them more wisely.

Compared with a year ago, there is almost an extra full-time employee in today's deli department. Currently, the average deli employs the equivalent of 8.5 full-time employees, up from 7.7 in 1988.

Each employee brings in weekly sales that now average $1,247. This is also up slightly ($35) in 1989. Despite having an

DELI LABOR & SERVICE

There have been significant cuts in deli labor costs, despite the introduction of prepared foods. This reverses the trend of previous years.

Call it fate, better management, or a dream come true—but labor costs are down in the deli department. In 1989, labor costs as a percent of sales were down 18%, compared with the 1988 level of 22.6%. A year ago, it looked like the increase in prepared foods would take its toll in labor costs, but the popularity of self-service may have turned the situation around.

The deli is employing more people: on average, almost an extra full-time employee per unit. Extra deli sales have not only driven down the percentage of sales needed to pay for these employees, but has driven up the average weekly sales per employee to $1,247.

Retailers are expecting more self-service offerings in their delis, leaving their employees free to spend more of their time in food preparation and maintenance of the facilities.

Number of Employees

Full-time	4.0
Part-time	8.9
Full-time Equivalent*	8.5

Full-Time Equivalent Employees

Fewer than 4	8%
4-5	17
6-7	29
8-10	17
11 or more	29
Total	100%

*two part-time = one full-time employee

How Much for Labor

(Labor as a Percent of Service Deli Sales)

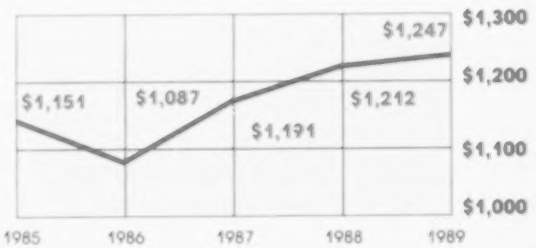
Mean	18.0%
Median	17.8%
10-15%	14%
16-20	32
21-25	33
26-30	18
Over 30	3
Total	100%

Average Weekly Sales Per Employee*

Mean	$1,247
$750 or less	5%
$751-$1,000	20
$1,001-$1,500	47
$1,501-$2,000	25
Over $2,000	3
Total	100%

*Full-time equivalent employees

Average Weekly Sales Per Employee



Special Area for Consuming Foods Drink From Deli On Premises

Percent of Companies Offering

Have facilities	72%
No facilities	28
Total	100%

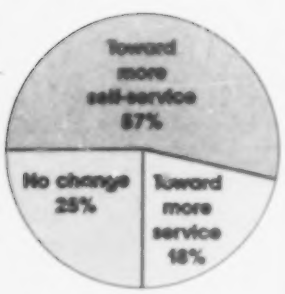
Time for Prep and Service

Breakdown of Labor Hours

Customer service	61%
Other (incl. prep)	39
Total	100%

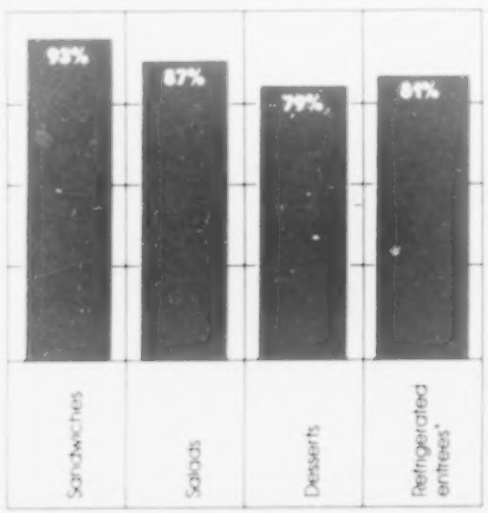
Trends in Service

Direction Deli Directors Expect Their Operations to Move



Offerings of Prepackaged Products in Self-Service Cases

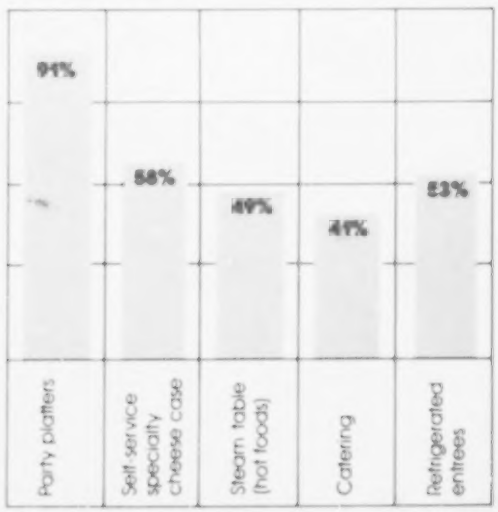
Percent of Stores Offering



*To be heated/microwaved at home

Special Services

Percent of Stores Offering



DELI PRODUCTION & SUPPLY

Labor shortages, food safety issues, and consistency problems have made some retailers reevaluate their instore production policies. The result is that many are buying prepared food.

It seems that a majority of deli operators now buy their prepared food items from a foodservice manufacturer, and buy it from a foodservice wholesaler/ distributor, and make it instore from scratch.

With the increased sophistication of some items, retailers are having a hard time getting the labor to produce these items consistently, so they turn to foodservice manufacturers to produce it for them. Potential problems of food safety have also caused some retailers to buy more ready-made products. On the other hand, retailers are now more able to make some items themselves, and finish others. That is why the average deli gets its products from a variety of sources.

Commissaries

Percent of Companies Having Company Operated Commissary From Which Stores Order

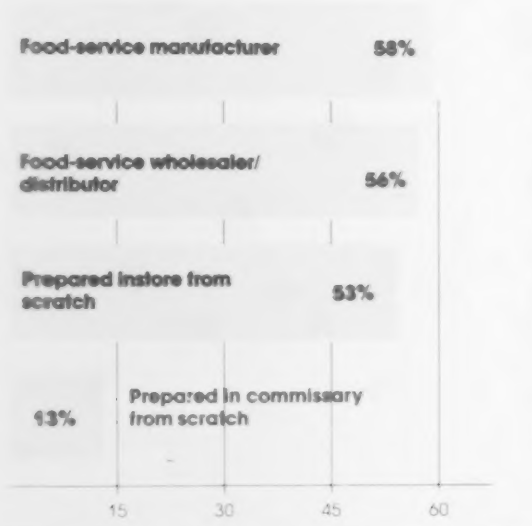
Have commissary	26%
Do not have commissary	74
Total	100%

Main Function of Commissary

Preparation from scratch ingredients	69%
Ordering from food-service suppliers	31
Total	100%

Sources of Service Deli Salads

Percent of Stores Using



extra employee, the portion of department sales that goes to labor is down to just 18 percent (from 22.6 percent last year).

More self-service and sales of higher-priced, more profitable items are the primary reasons behind the decrease in labor costs.

Retailers report that a slightly higher percentage of deli employee time is spent in preparing food and maintenance (39 percent) than in previous years. Consequently, employees are required to spend less time waiting on customers (61 percent of the time), giving credence to the notion that self-service is on the rise.

Same old problem

One problem has plagued deli operators since the beginning of recorded deli operations: how to get more people to shop the deli.

Given the profitability of the section, having only one out of every five store customers purchasing deli products is very disappointing. The tremendous profit potential of the other 80 percent of shoppers is an inviting prospect.

Retailers have not ignored the other four out of five people. They have diverted their energies into self-service, prepared foods, catering, ethnic sections, sit-down areas and all the other permutations of instore foodservice in attempts to lure these diehard shoppers into the deli.

Not much has worked. These sections have increased sales and added profits, but still, only 19.8 percent of all store shoppers make a purchase at one of the deli sections. The good sign is that 19.8 percent represents an increase in traffic over the 19.2 percent of 1988.

Chances are that some shoppers may never be persuaded to shop the deli. For one reason or another, the deli just doesn't interest them.

But one theory holds that the shoppers we have been trying to reach are actually shopping the deli already. Traditionally, the percentages of deli and non-deli shoppers have been tracked by comparing customer traffic with scanned deli purchases at checkout.

Perhaps many deli customers are simply less frequent deli purchasers than they are store customers. They make purchases from the deli, but only once in every five shopping trips. The other shopping trips may be smaller visits to the store for staples.

The plausibility of this explanation is backed up by the amount of the average deli transaction. The transactional amount is up to $4.55, which is up over $1 from 1988 levels.

If this is truly part of the explanation, then we are missing the boat by trying to convince the "other" store customers to shop the deli. Promotion money may be better spent getting the known deli shopper to increase spending, or making deli or foodservice items into staples that will be purchased on those smaller shopping trips.

Only when we can really track an individual's purchasing habits through the use of EFT or "smart cards" will we be in a better position to see if there really is a significant number of hardcore non-deli shoppers, or

DELI MERCHANDISING & CUSTOMERS

Our present customers are spending a dollar more per visit in the deli. Unfortunately, we still can't get more people to visit our delis, no matter how much extra promotion and advertising we do.

Almost 20% (19.8%) of store customers shop the deli nowadays. This is encouraging, because it is ever-so-slightly more than last year, but it is still far below what most operators would like.

Those that do shop the deli are spending more there. The average deli transaction was up to $4.55, this is $1.05 more than the average transaction in 1988. The increased popularity of more expensive prepared foods has increased the size of the average transaction, and helped drive total deli sales up.

Ad and demo allowances from manufacturers are very important to the vast majority of retailers. These are two avenues from which a manufacturer can endear himself to a deli operator.

How Customers Spend

Percent Who Shop the Deli	
Mean **19.8%**	Median **18.0%**

How Much They Spend	Mean $4.55
Under $2.00	**4%**
$2.00 - $2.99	**31**
$3.00 - $3.99	**36**
$4.00 - $5.99	**24**
$6.00 or more	**5**
Total	**100%**

Advertising and Promotion Sell Service Deli

	Percent Using
Sampling	**91%**
Newspapers	**85**
Point-of-purchase	**78**
Circulars	**81**
Radio	**58**
Television	**39**

Delis' Share of Ad Space Compared to Share of Sales

Greater	**35%**
Less	**35**
Equal	**30**
Total	**100%**

How Retailers Rate the Promotion and Advertising Help from Deli Suppliers

Excellent	**11%**
Good	**54**
Fair	**35**
Poor	**0**
Total	**100%**

Where Retailers Need More or Better Quality Help from Deli Suppliers

	Companies Wanting More Help	Companies Wanting Better Help
Instore demos	**81%**	**46%**
Point-of-purchase materials	**54%**	**27%**
Deli coupons	**50%**	**23%**
Ad allowances	**81%**	**27%**

if they were basically a statistical phenomenon all these years.

Future growth

The slowing of deli department growth, both in units and percentage increases, means that the department has to spur renewed growth in some way.

But caution is needed. In their haste to get as much out of deli sales as possible, and to offer the customer convenience as a means of competing with other elements of the food industry, many retailers have rushed into areas that they are not familiar with.

Many retailers have placed too much of a burden on the deli department, and its management. For one reason or another, all the peripheral prepared food departments have usually been tucked under the deli's wing.

For the short run, this may be the most logical place to put these sections, given the usual operational set-up of a grocery company. It is, however, reminiscent of the days when all the foodservice departments, including deli/bakery, fish and snack bars were under the jurisdiction of the meat department.

Just as deli, bakery and fish evolved into their own disciplines, so too will these other sections evolve out of the deli. Should foodservice be its own separate department? Should deli and foodservice be kept together, but divided into hot and cold foods, as is already done in some companies?

The answer depends on what each company sees as its own objectives in the deli/foodservice business. As these services are now set up within most supermarket companies, they may soon reach the point where the number and variety of the services have outgrown the present structure.

It is hoped that they will not reach the point of unmanageability that will tarnish the quality of the deli itself.

Some retailers want to do a lot more in terms of foodservice, while others see themselves—and their delis—as still being primarily in the business of selling groceries.

Either of these visions of the purpose of the deli in the particular organization is fine—as long as the vision of the organization shapes the deli, and the deli is not allowed to shape the organization. ■

DAIRY

DAIRY (BASE = FEMALE HOMEMAKERS)	PERCENT WHO USE (1989)	USE BY GEODEMOGRAPHIC GROUP (+/− % VS. TOTAL U.S.) 1	2	3	4	5	6	7	8	9	10
	+ Average −	+ 8	− 17	+ 7	− 2	+ 8	− 7	+ 8	− 4	− 6	− 11
American, Pasteurized, Processed Cheese (HU)	18.4	− 29	− 24	+ 9	− 4	+ 6	− 18	+ 24	+ 4	—	+ 1
Butter	37.4	+ 21	+ 12	+ 7	+ 5	− 10	+ 5	− 8	− 6	− 13	+ 9
Cheese Snacks	17.9	+ 14	− 36	+ 5	− 19	+ 27	+ 1	+ 15	− 26	+ 5	− 10
Cheese Spread	25.7	+ 11	− 15	+ 5	− 2	+ 27	− 17	+ 10	− 4	− 10	− 36
Cream Cheese	52.8	+ 23	− 1	+ 10	+ 10	+ 5	− 3	− 4	− 1	− 21	− 22
Dips, Ready-to-Serve	28.8	− 5	− 31	+ 11	− 16	+ 12	− 7	+ 16	− 2	+ 9	− 30
Margarine (HU)	18.7	− 22	− 14	− 7	− 12	+ 13	− 17	+ 19	+ 7	+ 10	—
Orange Juice, not frozen	47.8	+ 8	− 7	—	+ 7	− 3	− 10	− 1	− 3	—	+ 15
Dough Products, Refrigerated (HU) (incl. frozen)	10.1	− 37	− 57	− 7	− 32	− 18	− 16	+ 28	− 1	+ 67	+ 31
Sour Cream	50.7	+ 28	− 3	+ 16	+ 5	+ 14	− 2	− 2	− 6	− 22	− 42
Yogurt (HU)	13.6	+ 47	− 3	+ 11	+ 21	+ 9	+ 9	− 17	− 15	− 49	+ 14
Cottage Cheese	54.9	+ 6	− 13	+ 3	+ 14	− 2	− 10	+ 4	+ 6	− 3	− 25
Cheese, Natural or Imported (HU)	6.7	+ 39	− 22	+ 26	+ 4	+ 15	− 1	+ 5	− 17	− 38	− 24
Milk, Fresh (HU)	28.9	− 9	− 20	+ 9	− 14	+ 15	− 16	+ 18	+ 8	+ 1	− 33

(HU) = Heavy Users

Supermarkets located in areas where affluent suburban professionals live (Group 1) have long learned the necessity of providing a large, well-stocked dairy department. Products such as sour cream (+28% above average), yogurt (+47%) and natural or imported cheese (+39%) sell better here than among any other group. They do lighten up a bit, however, on usage of margarine and American cheese.

As income rises, consumption of butter tends to increase at the expense of margarine. Margarine shows its best performance among the blue-collar rural families of Group 7, a sector that's also devoted to such basics as American cheese and milk, but below average in yogurt usage.

In addition to selling well in Group 1, imported cheeses of the type often found in service delis are welcome among the white collar families of Group 3 and the younger families of Group 5.

MEAT

REFRIGERATED MEATS (BASE = FEMALE HOMEMAKERS)	PERCENT WHO USE (1989)	USE BY GEODEMOGRAPHIC GROUP (+/− % VS. TOTAL U.S.) 1	2	3	4	5	6	7	8	9	10
	+ Average −	+ 2	− 28	+ 7	+ 2	+ 10	− 15	+ 7	− 7	+ 10	− 13
Bacon/Breakfast Strips (HU)	18.0	− 17	− 37	− 20	− 19	+ 15	− 11	+ 1	− 11	+ 48	+ 42
Cold Cuts (HU)	40.0	− 10	− 28	+ 5	+ 1	+ 8	− 7	+ 14	+ 2	+ 5	− 24
Cornish Hens	10.8	+ 46	− 7	+ 16	+ 6	+ 24	− 11	− 4	− 23	− 27	− 18
Frankfurters/Weiners	16.0	− 38	− 55	− 11	− 6	− 2	− 10	+ 23	− 8	+ 50	+ 24
Ham, Canned	20.0	− 5	− 20	− 1	− 5	+ 2	− 28	+ 8	—	+ 27	+ 4

(HU) = Heavy Users

One man's meat is obviously another's nonpurchase. The breakfast specialties, bacon and sausage, find relatively few fans at the upper end of the income scale, but stores with a base of lower-income customers can expect sales to be swift. The pattern is similar for cold cuts, frankfurters and wieners.

Groups 2 and 6 are dissimilar in incomes, but both have a population that's below average in age and likely to live in the West—and both show the lowest average overall rates of consumption of refrigerated meats.

1. High education, very high income, suburban professionals
2. Urban, mobile professionals, high income
3. High income, homeowners, white-collar families
4. High income, older, white-collar workers
5. Younger, high mobility, high income
6. Younger, mobile, low income, few children
7. Average income, blue-collar families, rural
8. Low income, older, few children
9. Low education, low income, rural, blue-collar workers
10. Very low income, urban, blacks, apartment dwellers

Note: For a full description of these groups, see pages 22-23.

Source: Mediamark Research, Inc. and ClusterPLUS

TARGETING YOUR TRADING AREA

REFRIGERATED MEATS (BASE = FEMALE HOMEMAKERS)	PERCENT WHO USE (1989)	USE BY GEODEMOGRAPHIC GROUP (+/- % VS. TOTAL U.S.) 1	2	3	4	5	6	7	8	9	10
Liver Sausage/Liverwurst	11.0	+ 33	- 28	+ 36	+ 30	- 5	- 33	+ 9	- 16	- 29	- 6
Sausage (HU)	20.7	- 34	- 31	- 9	+ 3	- 3	- 15	+ 11	+ 2	+ 43	+ 6
Meat, fresh or frozen (HU)	20.5	- 2	- 38	+ 1	+ 6	+ 21	- 23	+ 14	+ 2	+ 9	- 42
Turkey, whole, fresh	8.9	+ 21	- 17	+ 20	+ 20	+ 22	- 35	- 10	+ 1	- 16	- 26
Turkey, whole, frozen	11.3	+ 17	- 33	+ 38	- 1	+ 8	- 6	+ 1	- 10	+ 3	- 60
Chicken, frozen	14.4	+ 7	- 39	+ 4	- 15	+ 26	+ 9	+ 16	- 20	+ 8	- 33
Chicken, fresh	49.8	+ 7	- 5	+ 3	+ 1	+ 2	- 7	+ 5	+ 3		- 23

(HU) = Heavy Users

Two unlikely refrigerator-mates, Cornish hens and liverwurst, often share accommodations in the homes of affluent suburban Group 1, along with both turkey and chicken.

PRODUCE

PRODUCE DEPT. (BASE = FEMALE HOMEMAKERS)	PERCENT WHO USE (1989)	USE BY GEODEMOGRAPHIC GROUP (+/- % VS. TOTAL U.S.) 1	2	3	4	5	6	7	8	9	10
+ Average −		+ 21	- 18	+ 4	+ 10	+ 8	- 16	+ 10	- 6	- 12	- 19
Fruit, Dried	32.7	+ 26	- 1	+ 9	+ 10	- 6	- 8	- 1	- 2	- 10	- 21
Fruit, Fresh (HU)	32.4	+ 28	- 29	+ 1	+ 10	+ 15	- 18	+ 14	- 8	- 15	- 26
Vegetables, Fresh (HU)	30.6	+ 10	- 24	+ 3	+ 9	+ 16	- 23	+ 18	- 9	- 12	- 9

(HU) = Heavy Users

Fresh produce, both fruits and vegetables, exerts the strongest pull among the above-average income members of Groups 1, 4 and 5 and among the average-income blue-collar families of Group 7. At the low end of the income scale, consumption of produce is generally low, as it is among the affluent urban professionals of Group 2.

GENERAL MERCHANDISE

AUTO SUPPLIES (BASE = ADULTS)	PERCENT WHO USE (1989)	USE BY GEODEMOGRAPHIC GROUP (+/- % VS. TOTAL U.S.) 1	2	3	4	5	6	7	8	9	10
+ Average −		- 10	- 22	- 2	- 5	+ 7	- 10	+ 18	0	+ 15	- 24
Auto Wax/Polish	33.9	- 2	- 14	+ 1	+ 5	+ 12	- 16	+ 6	+ 5	+ 1	- 24
Anti-Freeze (HU)	16.9	- 6	- 27	- 4	- 13	+ 18	- 21	+ 27	- 2	+ 18	- 36
Gasoline Additives	15.1	- 12	- 17	- 3	- 4	- 1	+ 1	+ 21	- 6	+ 12	- 11
Motor Oil (HU)	20.7	+ 1	- 35	+ 5	- 8	+ 13	- 15	+ 22	- 1	+ 13	- 47
Motor Oil Additives	13.9	- 29	- 15	- 8	- 7	- 5	+ 1	+ 13	+ 3	+ 33	- 3

(HU) = Heavy Users

Two geodemographic sectors show the highest predisposition to do it themselves when it comes to the family car. They are the average-income, blue-collar families of Group 7, who tend to live in rural areas, and their lower-income equivalents in Group 9.

Higher-income groups presumably prefer to have others service their cars, accounting for their below-average usage of auto supplies. The lowest-income urban members of Group 10 have a low rate of car ownership that correlated with their disinterest in auto supplies.

1. High education, very high income, suburban professionals
2. Urban, mobile professionals, high income
3. High income, homeowners, white-collar families
4. High income, older, white-collar workers
5. Younger, high mobility, high income
6. Younger, mobile, low income, few children
7. Average income, blue-collar families, rural
8. Low income, older, few children
9. Low education, low income, rural, blue-collar workers
10. Very low income, urban, blacks, apartment dwellers

Note: For a full description of these groups, see pages 22-23

Source: Mediamark Research, Inc. and ClusterPLUS

TARGETING YOUR TRADING AREA

GENERAL MERCHANDISE (BASE = ADULTS)	PERCENT WHO USE (1989)	USE BY GEODEMOGRAPHIC GROUP (+/– % VS. TOTAL U.S.) 1	2	3	4	5	6	7	8	9	10
+ Average –		+18	+6	+10	+2	+15	–5	+2	–8	–19	–29
Batteries* (HU)	16.7	+9	+8	+17	–7	+26	–24	+1	–8	–9	–24
Film (HU)	21.1	+31	+29	+18	+1	+13	+1	+2	–11	–39	–42
Pantyhose**	64.0	+11	+5	+7	–3	+4	–4	+1	–8	–5	–7
Plant Food, Indoor*	28.5	+27	–4	+10	+18	+9	–15	–4	–17	–1	–21
Video Tapes, Purchase (HU)	9.3	+13	–25	+18	–15	+35	–25	+4	–3	–18	–20
Writing Instruments	43.8	+8	–3	–1	–4	+5	+4	+5	–4	–5	–12
Greeting Cards (HU)	25.4	+16	+10	+9	+17	–1	+4	–9	+1	–18	–30
Microwave Cookware, Disposable	8.0	+37	+2	+10	+10	+25	–33	+111	–8	–26	–53
Microwave Cookware, Reusable	43.3	+7	—	+12	+10	+25	–18	+8	–5	–16	–49
Self-Stick Notes, Removable*	19.6	+48	+26	+18	–2	+21	+2	+7	–20	–39	–59
Audio Tapes	31.8	+16	+16	+9	–6	+20	+6	+1	–9	–31	–18
Video Tapes, Rental	46.1	+12	–4	+9	—	+28	+1	+5	–13	–18	–38
Watches	19.4	–3	—	+4	–5	–1	+21	+5	–7	–4	–15
Books (HU)	15.5	+26	+26	+2	+15	+4	+15	–8	–5	–37	–21

(HU) = Heavy Users *Female Homemakers **Women

This grab bag of general merchandise product categories demonstrates that the best opportunities for GM departments (and for store formats such as combination stores) can be found in areas with average to above-average incomes. Given that, a careful selection of just which categories should be given display preference within which geodemographic environments is critical.

Starting at the top of the income heap, the wealthier professionals of Groups 1 and 2 can be counted on to patronize sections featuring film, books, greeting cards and self-stick removable notes. Those living in the suburbs will show a greater interest in products such as indoor plant food, microwave cookware and video rentals than will those in the city.

The young families of Group 5, found mostly in the suburbs, are avid buyers and renters of videotapes, and will also stock up on a range of other GM merchandise, including batteries, film and microwave cookware.

HEALTH & BEAUTY AIDS

BABY/CHILDREN'S HBA (BASE = FEMALE HOMEMAKERS)	PERCENT WHO USE (1989)	USE BY GEODEMOGRAPHIC GROUP (+/– % VS. TOTAL U.S.) 1	2	3	4	5	6	7	8	9	10
+ Average –		–19	–34	–11	–18	+23	–8	+23	–10	+14	+13
Baby Lotion	13.7	–32	–29	–28	–22	+28	+1	+19	–8	+27	+24
Baby Oil	20.0	–18	–15	–8	–16	+13	+5	+17	–10	+18	–5
Baby Ointments	11.8	–22	–35	–3	–6	+16	+4	+25	–13	–9	+23
Baby Powder	24.4	–10	–27	–4	–20	+6	+5	+7	–6	+17	+20
[illegible]npoo	16.5	–12	–35	–10	–16	+22	–2	+13	–10	+20	+4
[illegible]th, Liquid	6.5	–19	–57	–6	–31	+38	+19	+31	–35	+8	+26

1. High education, very high income, suburban professionals
2. Urban, mobile professionals, high income
3. High income, homeowners, white-collar families
4. High income, older, white-collar workers
5. Younger, high mobility, high income
6. Younger, mobile, low income, few children
7. Average income, blue-collar families, rural
8. Low income, older, few children
9. Low education, low income, rural, blue-collar workers
98. Very low income, urban, blacks, apartment dwellers

Note: For a full description of these groups, see pages 22-23.

The younger, above-average-income families of Group 5 and the blue-collar, average-income families of Group 7 demonstrate above-the-norm usage across all 11 Baby/Children's HBA product categories. Group 5 has a higher incidence of children in the home (52.5%, which is 26% above the national rate) than any other, explaining its leadership in usage of such children's products as cold remedies and vitamins.

The low-income urban blacks of Group 10 show particularly strong loyalty to baby lotion, baby ointments, baby powder, liquid baby bath and baby's soap, suggesting the need for stores in this area to assign generous shelf space to these categories.

Source: Mediamark Research, Inc. and ClusterPLUS

TARGETING YOUR TRADING AREA

BABY/CHILDREN'S HBA (BASE = FEMALE HOMEMAKERS)	PERCENT WHO USE (1989)	USE BY GEODEMOGRAPHIC GROUP (+/- % VS. TOTAL U.S.) 1	2	3	4	5	6	7	8	9	10
Children's Cold Tablets/Liquids	14.8	- 17	- 29	- 6	- 23	+ 34	- 30	+ 31	- 6	+ 3	+ 11
Children's Cough Syrup	14.9	- 27	- 38	- 13	- 23	+ 26	- 31	+ 24	+ 7	+ 22	+ 11
Children's Fever Reducers/ Pain Relievers	24.9	- 14	- 46	- 5	- 19	+ 31	- 16	+ 27	- 9	+ 16	- 14
Soap, Baby's	8.4	- 36	- 23	- 22	- 17	+ 10	- 2	+ 28	- 7	+ 22	+ 31
Vitamins, Children's	14.7	- 3	- 38	- 21	- 9	+ 31	- 37	+ 34	- 17	+ 15	+ 17

The higher-income Groups 1 through 4 are weak consumers of baby and children's products— particularly the urban professionals of Group 2, who can be expected to wheel their shopping carts past this aisle quickly.

FIRST AID/SKIN CARE (BASE = ADULTS)	PERCENT WHO USE (1989)	USE BY GEODEMOGRAPHIC GROUP (+/- % VS. TOTAL U.S.) 1	2	3	4	5	6	7	8	9	10
	+ Average -	- 5	+ 2	- 1	0	+ 4	- 1	0	- + 1	+ 1	- 1
Athlete's Foot Remedies (HU)	3.5	- 7	- 9	- 1	+ 25	+ 18	+ 7	+ 12	- 5	- 42	- 3
Adhesive Bandages (HU)	16.8	- 15	+ 7	- 11	- 8	- 11	- 1	+ 1	+ 18	+ 18	- 3
Cotton Swabs* (HU)	23.3	+ 29	+ 24	+ 8	+ 14	+ 17	- 11	+ 6	- 17	- 20	- 47
Body Powder (HU)	7.7	- 36	- 15	- 9	- 8	- 35	- 6	- 15	+ 22	+ 42	+ 85
First Aid Products	17.3	- 13	+ 4	- 9	- 9	- 11	- 4	+ 8	—	+ 29	+ 8
Lip Balm (HU)	9.9	+ 4	+ 5	+ 13	- 10	+ 13	+ 17	- 16	- 14	- 5	+ 4
Sunburn Remedies	17.1	- 5	+ 4	+ 6	- 6	+ 14	- 8	+ 10	+ 5	- 8	- 31
Sunscreen/Suntan Products (HU)	11.6	+ 22	+ 16	+ 14	+ 15	+ 18	- 5	+ 5	- 5	- 41	- 50
Wart/Corn Removers	6.4	- 26	- 14	- 18	- 14	+ 13	+ 5	- 11	+ 2	+ 35	+ 30

(HU) = Heavy Users *Female Homemakers

Women in upper-income households, particularly the professionals of Groups 1 and 2, are frequent purchasers of cotton swabs. Allegiance to swabs shows an almost parallel drop to that of household income.

The pattern is reversed for body powder, which registers almost double the national rate of usage among the low-income, urban blacks of Group 10.

The more prosperous groups are the most likely to use sunscreen and suntan products, with only meager usage reported by the low-income constituencies of Groups 9 and 10.

COSMETICS (BASE = WOMEN)	PERCENT WHO USE (1989)	USE BY GEODEMOGRAPHIC GROUP (+/- % VS. TOTAL U.S.) 1	2	3	4	5	6	7	8	9	10
	+ Average -	+ 16	0	- 2	- 4	+ 9	+ 5	+ 2	+ 1	- 20	- 9
Blusher (HU)	10.0	+ 37	- 1	- 6	- 18	+ 22	+ 20	- 7	+ 5	- 46	- 7
Complexion Care Products (HU)	10.4	+ 12	- 5	- 4	+ 15	+ 1	+ 20	- 1	- 7	—	- 38
Face Creams/Lotions	69.3	+ 4	—	+ 1	+ 3	+ 1	- 4	- 1	—	—	- 7
Face Powder, Loose	31.6	+ 4	—	- 13	+ 1	- 1	+ 10	—	+ 7	—	- 9
Facial Toners	28.5	—	- 11	- 6	+ 1	+ 10	+ 14	- 2	+ 4	- 3	- 17
Foundation Makeup (HU)	8.1	+ 34	- 20	- 9	- 7	- 6	+ 10	- 1	+ 11	- 12	- 19

(HU) = Heavy Users

Women living in Group 1 areas, defined as wealthy, suburban and professional, show a strong commitment to keeping up personal appearances, judging by their above-average usage of almost every cosmetics product category. In the case of lipstick, for example, the incidence of heavy users in Group 1 is 60% above the national average. The only relatively soft lines are nail polish and nail polish removers.

The high-income urban professionals of Group 2 show more interest in nail polish, along with eye shadow and eye liner. Group 2 boasts the highest rate of working women.

1. High education, very high income, suburban professionals
2. Urban, mobile professionals, high income
3. High income, homeowners, white-collar families
4. High income, older, white-collar workers
5. Younger, high mobility, high income
6. Younger, mobile, low income, few children
7. Average income, blue-collar families, rural
8. Low income, older, few children
9. Low education, low income, rural, blue-collar workers
10. Very low income, urban, blacks, apartment dwellers

Note: For a full description of these groups, see pages 22-23.

Source: Mediamark Research, Inc. and ClusterPLUS

COSMETICS (BASE = WOMEN)	PERCENT WHO USE (1989)	USE BY GEODEMOGRAPHIC GROUP (+/– % VS. TOTAL U.S.) 1	2	3	4	5	6	7	8	9	10
Eye Liner	43.6	+17	+15	+ 6	– 1	+16	– 2	– 1	–. 9	– 23	– 8
Eye Shadow (HU)	10.3	+39	+ 4	+ 5	– 11	+32	– 3	+19	– 2	– 50	– 60
Lipstick/Lip Gloss (HU)	24.3	+60	+ 8	+10	+ 1	+18	– 13	– 1	– 13	– 32	– 46
Mascara (HU)	6.1	+24	– 5	– 27	– 19	+23	+21	+37	+14	– 56	– 41
Nail Polish (HU)	9.3	– 2	+15	+ 5	– 28	+18	+ 1	– 7	– 6	– 38	+77
Nail Polish Remover (HU)	8.8	– 10	—	+ 5	– 24	– 1	– 28	– 4	+ 6	– 5	+79
Perfume/Cologne (HU)	19.9	– 4	– 14	+13	+16	– 3	+ 2	– 5	—	– 14	+ 8
Pressed Powder	28.8	+ 5	+15	+ 9	– 9	—	– 1	+ 8	+ 2	– 8	– 26
Facial Cleansers (HU)	10.1	+23	+ 1	– 16	+18	+ 3	+25	– 11	+ 6	– 18	– 28

(HU) = Heavy Users

The low-income, rural, blue-collar members of Group 9 show the least interest in cosmetic products that highlight eye or nail appearance. Overall, in fact, this group has the lowest overall usage rates for the cosmetics department.

The picture is similar for the low-income, urban blacks of Group 10, except for their dramatically high rates of usage for nail polish (77% above the national average) and nail polish remover (+79%).

HAIR CARE, MEN'S (BASE = MEN)	PERCENT WHO USE (1989)	USE BY GEODEMOGRAPHIC GROUP (+/– % VS. TOTAL U.S.) 1	2	3	4	5	6	7	8	9	10
	+ Average –	– 10	– 4	– 3	– 3	+ 1	– 3	+ 3	– 5	+15	+13
Hair Conditioners (HU)	22.9	– 5	+ 4	– 3	– 12	+10	+26	+10	– 8	– 6	– 29
Hair Coloring	7.0	– 8	– 35	+ 3	+27	– 2	– 23	– 2	– 5	+26	+ 6
Hair Tonic/Dressing	18.4	– 33	+ 2	+10	– 11	– 24	– 12	– 3	– 13	+54	+70
Hair Sprays	29.9	– 1	+ 7	+ 8	+ 1	—	– 11	+ 6	—	– 2	– 11
Shampoo (HU)	53.4	+11	+ 3	+ 3	– 2	+15	+ 6	+ 4	– 8	– 18	– 23
Hair Conditioning Treatment	8.5	– 37	– 14	– 35	– 10	+ 1	– 8	– 2	– 18	+63	+108
Hair Mousse	13.7	+ 4	+ 6	– 5	– 15	+ 8	+ 1	+ 6	+15	– 10	– 31

(HU) = Heavy Users

Hair spray and shampoos are the only two product categories here that promise consistent above-norm performance in areas populated by men in households with above-average income. The men in the close-to-average-income households typified by Groups 5, 6 and 7 tend to be slightly younger than others, and are good prospects for a well-stocked assortment of conditioners.

Both hair conditioning treatments and hair tonics and dressings show robust usage patterns in Groups 9 and 10, which have a high proportion of black men.

Group 4 is above average in incidence of over-65, presumably gray-haired men, explaining its leadership in hair colorings for men, shared with the similarly seasoned men of Group 9.

HAIR CARE, WOMEN'S (BASE = WOMEN)	PERCENT WHO USE (1989)	USE BY GEODEMOGRAPHIC GROUP (+/– % VS. TOTAL U.S.) 1	2	3	4	5	6	7	8	9	10
	+ Average –	– 2	– 5	– 10	+ 2	+ 6	+ 5	+ 3	– 2	+ 3	0
Depilatories	14.5	– 14	+36	– 34	– 3	– 9	+ 7	+ 2	+ 3	+28	+15
Hair Coloring	24.1	– 2	+ 4	– 8	+10	– 3	– 3	+ 9	– 10	—	+17
Hair Conditioners (HU)	36.3	+13	+ 9	+ 5	+ 2	+12	+20	+ 1	– 11	– 20	– 29
Hair Mousse (HU)	10.6	+21	– 11	– 6	+ 5	+ 3	+ 5	+18	—	– 25	– 25

(HU) = Heavy Users

Women who belong to the white-collar families of Group 3 are, overall, the poorest prospects for a supermarket's hair care section, with the exception of two basics, shampoo and hair spray. Hair sprays are not as popular with the affluent professionals of Group 1 and 2, although they do share Group 3's taste for above-average usage of shampoo.

1. High education, very high income, suburban professionals
2. Urban, mobile professionals, high income
3. High income, homeowners, white-collar families
4. High income, older, white-collar workers
5. Younger, high mobility, high income
6. Younger, mobile, low income, few children
7. Average income, blue-collar families, rural
8. Low income, older, few children
9. Low education, low income, rural, blue-collar workers
10. Very low income, urban, blacks, apartment dwellers

Note: For a full description of these groups, see pages 22-23.

Source: Mediamark Research, Inc. and ClusterPLUS

HAIR CARE, WOMEN'S (BASE = WOMEN)	PERCENT WHO USE (1989)	USE BY GEODEMOGRAPHIC GROUP (+/– % VS. TOTAL U.S.) 1	2	3	4	5	6	7	8	9	10
Hair Styling Gels/Lotions (HU)	8.9	+ 4	– 19	– 18	+ 12	+ 46	+ 17	– 18	– 9	– 7	– 16
Hair Sprays (HU)	12.1	– 6	– 19	+ 8	+ 13	+ 12	– 3	—	+ 27	– 27	– 41
Home Permanents	15.6	– 40	– 51	– 33	– 8	– 19	– 18	+ 22	+ 1	+ 78	+ 44
Shampoo (HU)	42.9	+ 12	+ 7	+ 10	+ 4	+ 14	+ 20	+ 4	– 12	– 31	– 28
Hair Conditioning Treatments	18.5	– 6	+ 1	– 11	– 23	– 2	+ 1	– 15	– 11	+ 30	+ 66

(HU) = Heavy Users

Groups 9 and 10, with their large base of blacks, show distinctive usage patterns, with an avid interest in home permanents and hair conditioning treatments, as well as depilatories, but lackluster usage of other categories, particularly hair sprays and shampoo.

MISC. WOMEN'S HBA (BASE = WOMEN)	PERCENT WHO USE (1989)	USE BY GEODEMOGRAPHIC GROUP (+/– % VS. TOTAL U.S.) 1	2	3	4	5	6	7	8	9	10
	+ Average –	– 8	– 4	– 3	0	+ 7	– 1	+ 5	– 1	+ 3	– 3
Bath/Shower Additives (HU)	13.7	– 34	– 27	– 22	– 6	– 12	– 4	+ 3	+ 10	+ 56	+ 23
Body/Hand Creams/Lotions/ Oils/Moisturizers (HU)	37.0	+ 5	– 5	– 1	+ 3	+ 8	+ 6	– 7	– 9	+ 1	+ 4
Body Sprays, Deodorizers/ Colognes	12.9	– 45	– 25	– 28	– 28	—	+ 14	+ 13	+ 9	+ 26	+ 65
Fem. Hygiene Deodorant Sprays	14.0	– 45	– 11	– 23	– 7	– 8	– 9	+ 20	– 4	+ 35	+ 60
Fem. Hygiene Douches/ Suppositories	29.2	– 40	– 13	– 8	– 21	+ 2	– 13	+ 26	– 6	+ 34	+ 28
Medicated Skin Ointment (HU)	7.5	+ 7	– 14	+ 7	+ 1	+ 13	—	– 6	+ 10	– 1	– 45
Premenstrual or Period Pain Remedies	15.3	+ 3	+ 7	– 12	– 31	+ 8	+ 22	+ 18	– 11	– 6	+ 6
Razor Blades	21.9	– 1	+ 11	+ 12	+ 4	+ 6	– 13	+ 2	– 8	– 4	– 5
Razors, Disposable (HU)	17.7	– 10	+ 20	—	+ 9	+ 17	+ 14	+ 13	– 9	– 25	– 24
Sanitary Napkins (HU)	18.9	– 2	+ 2	+ 5	+ 12	+ 9	+ 2	+ 6	– 3	– 18	– 18
Shaving Cream/Gel	24.7	– 15	– 4	– 8	+ 11	– 3	—	—	+ 24	+ 2	– 24
Soap, Personal Care, Bar (HU)	29.4	+ 15	—	+ 3	+ 28	+ 3	– 10	+ 1	– 5	– 10	– 32
Soap, Personal Care, Liquid (HU)	19.8	+ 30	+ 10	+ 10	+ 23	+ 24	– 14	– 1	– 11	– 30	– 47
Tampons (HU)	10.6	+ 19	– 7	+ 14	– 5	+ 32	– 9	– 6	– 7	– 13	– 36

(HU) = Heavy Users

The expanded HBA sections of today's supermarkets provide a perfect setting for providing the optimum mix of the many product categories that make up women's health and beauty aids. But careful editing of product mix is necessary, as products that move quickly off the shelves of a store shopped by one geodemographic group may gather dust on another's.

Both liquid and bar personal soaps, for example, sell well at the upper end of the income scale, but are washouts among those with below-average incomes. The situation turns around for feminine deodorant sprays and douches/suppositories, with lower-income women showing rates of usage significantly above the national average, while their affluent sisters disdain these categories.

Disposable razors find most favor among the affluent urban professionals of Group 2, the geodemographic indicator which happens to have the greatest presence of working women.

ORAL HBA (BASE = ADULTS)	PERCENT WHO USE (1989)	USE BY GEODEMOGRAPHIC GROUP (+/– % VS. TOTAL U.S.) 1	2	3	4	5	6	7	8	9	10
	+ Average –	– 15	– 6	– 4	+ 3	– 6	– 7	+ 1	+ 3	+ 13	+ 20
Breath Fresheners (HU)	11.2	– 21	– 13	+ 6	+ 11	– 6	+ 3	+ 6	– 1	+ 2	+ 10

(HU) = Heavy Users

The Oral HBA department has one of the greatest rates of variation in usage among the various demographic groups, confirming the need for extra-careful space allocation. Both denture categories, for example, are washouts among the affluent professionals of Group 1 and 2, who presumably can afford attentive professional dental care to maintain and retain their teeth. But all three of the lowest-income groups are above-average buyers of denture products.

1. High education, very high income, suburban professionals
2. Urban, mobile professionals, high income
3. High income, homeowners, white-collar families
4. High income, older, white-collar workers
5. Younger, high mobility, high income
6. Younger, mobile, low income, few children
7. Average income, blue-collar families, rural
8. Low income, older, few children
9. Low education, low income, rural, blue-collar workers
10. Very low income, urban, blacks, apartment dwellers

Note: For a full description of these groups, see pages 22-23.

Source: Mediamark Research, Inc. and ClusterPLUS

ORAL HBA (BASE = ADULTS)	PERCENT WHO USE (1989)	USE BY GEODEMOGRAPHIC GROUP (+/− % VS. TOTAL U.S.) 1	2	3	4	5	6	7	8	9	10
Canker Sore/Gum/ Toothache Remedies	19.2	−24	− 5	− 8	− 8	− 9	+ 2	+ 1	+ 4	+26	+23
Dental Floss (HU)	8.2	+11	+15	− 6	+10	+ 9	+15	−15	−10	−12	+ 5
Dental Rinse	17.3	− 3	− 6	− 8	− 8	+12	−14	+ 8	—	+ 7	+ 3
Denture Cleaners	16.3	−44	−34	−13	+11	−25	− 8	+ 1	+32	+42	+15
Denture Adhesives/Fixatives	5.8	−49	−27	—	+13	−29	−25	− 3	+31	+51	+18
Mouthwash (HU)	14.5	− 8	—	−15	+10	− 6	−14	+ 5	+ 5	+14	+16
Toothbrushes (HU)	18.8	− 8	− 2	+ 6	−10	—	−13	+10	− 8	− 5	+44
Toothpaste (HU)	16.5	+ 7	—	+ 7	+ 7	+ 7	+ 6	− 6	− 8	−15	+ 3
Tooth Polish	10.4	− 6	+ 9	− 4	−10	−11	−18	+ 5	−18	+24	+66

(HU) = Heavy Users

Part of the oral health plans for affluent professionals is clearly dental floss, along with toothpaste.

Mouthwash sells somewhat better among low-income inhabitants of neighborhoods with Group 9 and Group 10 characteristics.

REMEDIES/MISC. HBA (BASE = ADULTS)	PERCENT WHO USE (1989)	USE BY GEODEMOGRAPHIC GROUP (+/− % VS. TOTAL U.S.) 1	2	3	4	5	6	7	8	9	10
	+ Average −	−11	−16	+ 2	− 6	− 2	− 9	0	+ 4	+18	+ 8
Asthma Relief Remedies (HU)	2.8	−23	−12	+11	−11	+11	−33	+18	−29	+29	+46
Cold/Sinus/Allergy Remedies (HU)	13.3	− 6	− 1	− 7	−13	+ 5	−13	—	+18	+ 7	− 2
Cough Syrup (HU)	7.1	−29	−19	− 1	−10	−14	−32	+17	+ 8	+43	+23
Diet Pills	4.7	+ 1	−30	+14	−15	+ 3	+14	+10	−21	+25	−34
Diarrhea Remedies	18.7	−22	−14	− 2	−17	− 6	−20	+18	− 1	+31	+22
Eye Drops/Eye Wash (HU)	9.9	− 2	−27	− 9	—	—	+ 4	− 2	+14	− 5	+16
Headache Remedies/Pain Relievers (HU)	35.4	−12	−16	+ 3	+ 5	− 4	− 9	− 1	+14	+11	−11
Indigestion Aids/Upset Stomach Remedies (HU)	12.9	−15	−13	−10	+15	−12	− 3	+ 4	+23	+16	−30
Hemorrhoid Remedies	12.5	−22	−19	+ 7	+ 4	− 9	− 4	− 4	+ 6	+36	−15
Laxatives (HU)	4.7	−22	−30	−20	− 4	−32	+12	+ 8	+23	+30	+26
Nasal Sprays (HU)	3.8	− 6	−45	+ 9	− 1	+ 9	−14	− 2	− 8	+23	+ 9
Sleeping Tablets	3.3	−25	−18	+ 3	−17	−14	+ 6	+ 5	+ 3	+25	+30
Throat Remedies (HU)	4.3	−27	−13	−10	—	—	−17	−13	−10	+35	+90
Pain Relieving Rubs/ Liquids (HU)	7.5	−38	−45	− 9	−22	− 7	− 5	−19	+23	+76	+12

(HU) = Heavy Users

Usage of remedies and miscellaneous HBA product shows such wide swings in frequency among the 10 geodemographic groups that the need for targeting space allocation based on geodemographic factors is evident. The category with relatively little variation appears to be cold remedies, formulated to combat a problem that does not seem to recognize geodemographic distinctions.

But in the case of diarrhea remedies and laxatives, HBA managers can expect relatively lukewarm shopper interest for stores located in areas characterized by above-average income. Both do extremely well in lower-income areas, however, peaking with the less-educated, rural, blue-collar workers of Group 9. That so many remedies, including cough syrup and throat remedies, as well as pain-relieving rubs and liquids, score so well with lower-income consumers may in part reflect their greater reliance on self-medication rather than the health-care system.

1. High education, very high income, suburban professionals
2. Urban, mobile professionals, high income
3. High income, homeowners, white-collar families
4. High income, older, white-collar workers
5. Younger, high mobility, high-income
6. Younger, mobile, low income, few children
7. Average income, blue-collar families, rural
8. Low income, older, few children
9. Low education, low income, rural, blue-collar workers
10. Very low income, urban, blacks, apartment dwellers

Note: For a full description of these groups, see pages 22-23.

Source: Mediamark Research, Inc. and ClusterPLUS

REMEDIES/MISC. HBA (BASE = ADULTS)	PERCENT WHO USE (1989)	USE BY GEODEMOGRAPHIC GROUP (+/− % VS. TOTAL U.S.) 1	2	3	4	5	6	7	8	9	10
Vitamin Tablets/Capsules/ Liquids (HU)	4.6	+43	+13	+36	+1	+7	−16	−16	−1	−46	−18
Contact Lenses, Soft, Daily Wear	5.4	+36	+39	+16	−7	+36	−8	−22	−1	−48	−31

(HU) = Heavy Users

All kinds of vitamins and aids to contact lens wear can be expected to move well in stores serving affluent Groups 1, 2 and 3.

SKIN CARE/SHAVING, MEN'S (BASE = MEN)	PERCENT WHO USE (1989)	USE BY GEODEMOGRAPHIC GROUP (+/− % VS. TOTAL U.S.) 1	2	3	4	5	6	7	8	9	10
	+ Average −	−2	+2			−2	−6	+3	−1	+5	+5
Aftershave Lotion/Cologne (HU)	13.5	+1	+6	+8	+2	−15	−3	+4	−3	+7	−2
Complexion Care Products	19.3	−13	−5	−13	+7	—	+3	—	+12	+5	−5
Disposable Razors (HU)	30.8	−1	−1	−3	−4	−4	+12	−3	+2	+10	−14
Electric Shavers	34.2	+8	−7	+3	+8	+3	−4	+10	+2	−18	−19
Facial Cleansers	16.7	−2	−9	−18	−2	+8	+6	+6	+7	+1	−10
Facial Toners	8.3	−10	−20	−7	−7	−1	−1	−4	−9	+36	+29
Body/Hand Creams/Lotions/ Oils/Moisturizers (HU)	14.5	−8	+4	+3	+5	−9	−26	+7	−19	+22	+56
Medicated Skin Ointment (HU)	5.2	−11	−1	−2	−14	−18	−2	+16	−16	+42	+13
Pre-Electric Shave Lotion	11.7	−16	−1	−9	+5	−14	−17	+12	+24	—	+11
Razor Blades	37.8	+5	−15	+9	−4	+8	−1	−1	−7	—	−6
Shaving Creams/Gels	60.0	−3	−5	—	−4	+4	+4	−4	+2	+4	−7
Soap, Personal Care, Bar (HU)	28.0	+3	+5	−2	+6	+5	−13	+4	—	−8	+5
Soap, Personal Care, Liquid (HU)	12.7	+22	+20	+20	+11	+14	−30	−2	−8	−38	+9

(HU) = Heavy Users

Just which HBA items are applied to that grizzly face in the mirror every morning varies significantly among various geodemographic groups, confirming the importance of setting this section according to local usage patterns.

Disposable razors show best acceptance among the younger men who make up Group 6, many of whom are urban apartment dwellers. Regular blades and electrics show across-the board appeal, except for a weakness for electrics among low-income men of Groups 9 and 10.

These two low-income groups, however, are strong adherents of a variety of men's skin care products, including facial toners, medicated skin ointments and all kinds of lotions, oils, and moisturizers for both hands and body.

New liquid soaps have gain strong acceptance among men living in higher-income neighborhoods, typified by Groups 1 through 5.

1. High education, very high income, suburban professionals
2. Urban, mobile professionals, high income
3. High income, homeowners, white-collar families
4. High income, older, white-collar workers
5. Younger, high mobility, high income
6. Younger, mobile, low income, few children
7. Average income, blue-collar families, rural
8. Low income, older, few children
9. Low education, low income, rural, blue-collar workers
10. Very low income, urban, blacks, apartment dwellers

Note: For a full description of these groups, see pages 22-23.

Source: Mediamark Research, Inc. and ClusterPLUS

HEALTH & BEAUTY AIDS: SAMI FOUR-WEEK FOOD STORE UNIT TRENDS VS. YEAR AGO

PRODUCT GROUP AND CATEGORY	% CHANGE VS. YEAR AGO 4 WEEKS ENDING 11/3/89	4 WEEKS ENDING 12/1/89	4 WEEKS ENDING 12/29/89
BABY NEEDS	**– 0.3%**	**+ 1.0%**	**+ 1.8%**
Baby Powders	+10.8	+ 7.1	– 2.1
Baby Oils, Creams & Lotions	– 6.8	– 2.8	+ 2.5
Infant Clothes	–12.4	– 4.9	– 2.7
Nursing Supplies	+ 3.9	+ 3.4	+ 3.2
PERSONAL NEEDS	**+20.9%**	**+23.2%**	**+20.7%**
Contraceptives	+14.8	+23.7	+22.6
Personal Lubricants	+17.4	+18.3	+20.2
Home Testing Kits	+32.6	+22.3	+11.3
Thermometers	+39.4	+25.4	+22.9
DEODORANTS	**– 2.2%**	**+ 0.5%**	**– 0.6%**
Sprays	–12.3	– 7.9	– 9.6
Roll-Ons	– 7.1	– 1.3	– 5.8
Stick Deodorants & Pads	+ 5.0	+ 1.9	+ 4.8
Creams	– 5.8	– 3.9	– 6.5
Deodorants & Talcum Powders	– 0.3	+ 9.9	+ 1.1
Feminine Hygiene Deodorants	–13.7	0	– 6.2
Foot Deodorants & Athlete's Foot Remedies	+ 6.4	+ 6.0	+ 1.6
Feminine Douches	– 0.3	+10.5	+ 6.1
FIRST AID	**+ 2.4%**	**+ 7.7%**	**+ 3.4%**
Antiseptics	+ 1.2	+ 3.9	+ 4.2
First Aid Products	+ 2.3	+ 7.2	+ 2.8
Elastic Goods & Dressings	+76.3	+98.1	+55.9
HAIR CARE NEEDS	**+ 1.4%**	**+ 3.8%**	**+ 1.5%**
Shampoos	+ 2.6	+ 6.4	+ 3.0
Hair Sprays	– 1.7	– 2.5	– 3.5
Hair Conditioning Rinses	+ 4.3	+ 8.2	+ 6.3
Hair Setting Needs	+ 6.5	+12.9	+ 9.3
Home Permanent Kits	+ 1.6	– 9.2	– 4.4
Hair Coloring	– 5.3	– 2.0	– 4.5
Hair Dressing Needs	– 7.1	– 8.1	– 7.9
ORAL HYGIENE	**– 0.6%**	**+ 1.6%**	**– 2.1%**
Toothpastes & Powders	– 1.5	– 0.6	– 4.6
Mouthwashes	– 0.6	+ 3.6	– 1.4
Breath Fresheners	+ 6.4	+ 8.7	+ 4.2
Denture Cleaners	– 9.4	– 7.3	–10.9
Denture Adhesives	+ 0.6	+ 0.1	+ 4.2
Toothbrushes	+ 5.7	+10.6	+ 5.7
Dental Aids	– 2.2	+ 5.8	+10.1
PROPRIETARY REMEDIES	**+ 2.0%**	**+ 1.1%**	**+ 2.8%**
Antacids	– 2.9	– 0.2	– 3.1
Internal Analgesics	– 2.1	+ 1.3	+ 0.7
External Analgesics	+ 0.3	– 2.3	+14.2
Cold Remedies	+ 6.0	+ 4.1	+12.3
Nasal Sprays/Drops/Inhalers	+ 4.1	– 3.7	+ 6.2
Chest Rubs	– 8.1	– 2.0	+ 5.7
Cough Remedies	+ 9.3	– 1.0	+ 5.1
Laxatives	+ 3.9	+ 3.3	+ 2.6
Sleeping Aids	+ 5.0	+ 2.3	+ 0.7
Tranquilizers	+ 1.6	+ 1.7	– 5.8
Eye Care Products	+ 4.2	+ 6.8	+ 3.5
Appetite Suppressants	–18.6	–22.5	–21.4
Synthetic Vitamins	– 1.8	+ 2.1	– 1.1
Natural Vitamins	+ 8.6	+11.2	+ 6.1
SHAVING NEEDS	**– 2.3%**	**– 2.7%**	**– 2.6%**
Shaving Creams	+ 4.2	– 2.8	+ 0.4
Pre-Shave Lotions	– 4.8	+ 8.2	+ 5.1
After-Shave Lotions	– 7.0	– 0.5	+ 2.5
Razor Blades	– 4.9	– 3.1	– 5.4
Razors & Blades	+25.8	+28.7	+30.3
SKIN CARE AIDS	**– 4.4%**	**– 2.1%**	**+ 3.2%**
Hand & Body Creams & Lotions	– 5.9	– 4.5	+ 0.4
Facial Preparations	0.0	+ 3.2	+ 3.8
Lip Care Products	– 8.3	– 9.1	+ 9.8
Suntan Lotions & Oils	–30.3	+ 4.9	+11.6
Cosmetic & Medicated Skin Aids	+ 2.4	+ 4.7	– 0.7
TOTAL ALL CATEGORIES	**+ 0.4%**	**+ 1.0%**	**+ 1.3%**

STRONG 1989 FINISH FOR HBA UNIT SALES IN FOOD STORES

Four-week dollar increase of 6.8% is second only to 10.5% gain for refrigerated foods, as two-thirds of HBA categories gain.

BY ALAN B. MILLER, JR.

During the final Arbitron/SAMI 28-day reporting period of 1989, sales in all 57 HBA product categories combined reached $714 million, representing a gain of 6.8% over the corresponding period in 1988. On a unit measurement basis, the increase amounted to 1.2%, slightly less than the 1.5% improvement during the preceding four-week period, but a better showing than the 1.0% loss for the full year.

Volume down 1% in 1989

Unit volume in all five SAMI departments combined advanced a scant 0.6%, led by a unit sales increase of 1.9% for refrigerated foods. Two departments, however, ended the year with a downward trend: health and beauty aids (–1.0) and dry grocery nonfood (–0.1%).

During the same four-week period, HBA unit sales through drugstores in the same 57 product categories were only 0.5% ahead of last year. On a full-year basis, HBA sales in drugstores showed a slightly better trend than in food stores, since they were 0.1% below 1988 in drug outlets, but a full percentage point behind in food stores.

In December there were six HBA product groups with unit volume gains and three with losses. The best showing was the 20.7% increase in the newest product group—miscellaneous personal needs—where such items as contraceptives, home testing kits and clinical thermometers are found.

The poorest showing by a product group was the 2.6% loss for shaving needs. But volume stemming from the new Gillette Sensor Blitz in January, 1990, should be sufficient to push this product group into the plus column when the first returns of the new year are tabulated.

In all, there were 38 categories with four-week unit volume gains and just half as many showing unit volume losses.

The strongest percentage improvement was the 55.9% advance for elastic goods and dressings; but this increase was aided by the addition of new items which were not counted in the previous year's tracking.

In the baby needs product group, the gains and losses were split evenly, with losses for baby powders (–2.1%) and infant clothes (–2.7%), but gains for both baby oils, creams and lotions (+2.5%) and nursing supplies (+3.2%). There were no new million-dollar-a-year brands in the product group in 1989, and the best major brand tonnage gain was achieved by Mennen's Baby Magic.

All four of the categories in miscellaneous personal needs product group showed increases, ranging from +22.9% for clinical thermometers to +11.3% for home testing kits.

Equal numbers of categories had gains and losses in the personal deodorants product group. The highest loss rate was -9.6% for spray deodorants, where the only two million-dollar brands exhibiting gains were Lever Bros.' Impulse and the brand with the unlikely name of Irresistible Imposter.

Roll-ons were also weak overall (–5.8%), but there were some bright spots on a major-brand basis, including Mitchum and Lady Mitchum, as well as Arrid Extra Dry Glide-On and Soft & Dri. The two deodorant categories with the strongest showings were feminine douches/washes/powder (+6.1%) and stick deodorants and pads (+4.8%). The only major new brand of deodorant during the year was Faberge Power Stick. The primary reason for a 6.2% decline for feminine hygiene deodorants was the reaching into maturity of Massengill towelettes, which were enjoying introductory strength a year earlier.

All three first aid product categories trended upward, and each ended up the full year with

gains. The four-week gain for antiseptics (4.2%) was aided by a strong upsurge for both Neosporin and Cortizone 5. First aid products improved 2.8% over last year, helped in part by the roll-out of Mickey and Pals and strong private label activity.

New shampoos help category

Only three of the seven categories of hair care needs tracked by Arbitron/SAMI showed gains, but strong showings by shampoos (3.0%) hair conditioning rinses (6.3%) and hair setting needs (+9.3%) were sufficient to cause product group growth of 1.5%.

In the shampoo category, both Pert Plus and Pert displayed strength, and three new products contributed added sales: Rave, Nutrasome and Bold Hold.

Some of the brands responsible for the upsurge of 9.3% in the hair setting needs category were L'Oreal Studio, Salon Selectives, Finesse, Vital Care, Bold Hold and La Looks.

The oral hygiene product group suffered a drop of 2.1% for the four-week and a 2.1% decline for the full year. A 4.6% decline for toothpastes and powders can be faulted for the product group's overall weakness. The special products for children have not demonstrated staying power, and there were no important new dentifice brands launched during the year. Both the Regular Gel and the Tartar Control versions of Close-Up have done well, and Arm and Hammer Dental Care has enjoyed a good growth year.

Mouthwash unit volume receded 1.4% despite a share increase for Listerine and the introduction of Plak Attack in 30 Arbitron/SAMI markets. Denture cleaners had reduced volume (−10.9%), but four-week sales of denture adhesives were 4.2% ahead of the year-ago rate. The highest major-brand volume increase rates in the toothbrush category are being accomplished by Oral-B Ultra, Colgate Plus, Prevent and Pepsodent.

A significant portion of the increase in the dental aids category comes from private label items of dental floss. Arbitron/SAMI is now tracking 15 rather than 14 categories of proprietary remedies. Such products as boric acid, epsom salt, witch hazel and rubbing alcohol have been removed from external analgesics and made into a separate miscellaneous category, which will begin to appear in next month's column.

Cold remedies are hot

As a result of a bumper crop of coughs and colds at the end of 1989, there were unit volume gains in 10 categories of proprietary remedies. The categories with double-digit gain rates were external analgesics, where doubling of sales of Bristol-Myers' Mineral Ice helped to bring about a category advance of 14.2%, and cold remedies, which benefitted from the roll-out of Theraflu and the national launching of Co-Advil.

The 21.4% decline for appetite suppressants in traceable to the wide acceptance of Slim Fast and Ultra Slim Fast in the measured diet meals shelf-stable foods category. The only major new product on the vitamin front was Johnson and Johnson's national launch of Sesame Street.

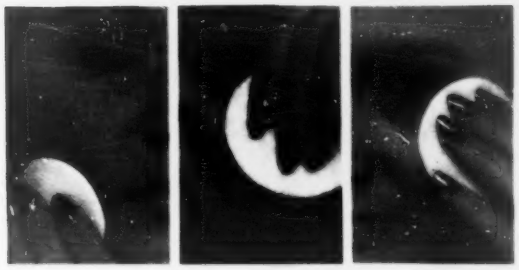
The 2.6% loss rate in the shaving needs product group can be blamed entirely on reduced sales of razor blades, which is the highest-volume category in the group. There have been four major new product launchings in the product group during the year: Soft Sense Shaving Cream, Edge After Shave Lotion, Wilkinson Ultra Glide Razor Blades and Schick Slim Twin razor sets.

Among razor blades, there was strong growth for Gillette Trac II Plus and Daisy Ladies Plus. Gillette Foamy is exhibiting strength within the shaving creams category.

All but one of the five categories of skin care aids had volume gains during the final reporting period of the year. There was a loss of less than 1% for cosmetic and medicated skin aids, as some of the acne medications had weak sales.

The best trending in this product group was for lip care products, a category in which sales of Chapstick, Blistex, Blistik and Carmex enjoyed vigorous sales. Facial preparations were up 3.8%, thanks in good measure to Oil of Olay Lotion, Night of Olay, St. Ives and Clean and Clear.

EVERY NIGHT, OVER 50 MILLION WOMEN IN AMERICA TAKE IT ALL OFF.



Then wake up the next morning and put it all back on again. Whether it is make-up or nail polish, over 50 million women apply and remove beauty care products twice a day.* That is why we are introducing *Swisspers™ 100% Cotton Rounds.*

Swisspers, now manufactured for the first time in the U.S., will be preferred by customers who apply and remove cosmetics because these 100% absorbent cotton rounds are soft, smooth and free of tints, dyes and fragrances. And they are easy to hold and fit the natural contours of the face.

Swisspers will be introduced through a coordinated program that will include consumer advertising, in-store displays, promotions and sampling.

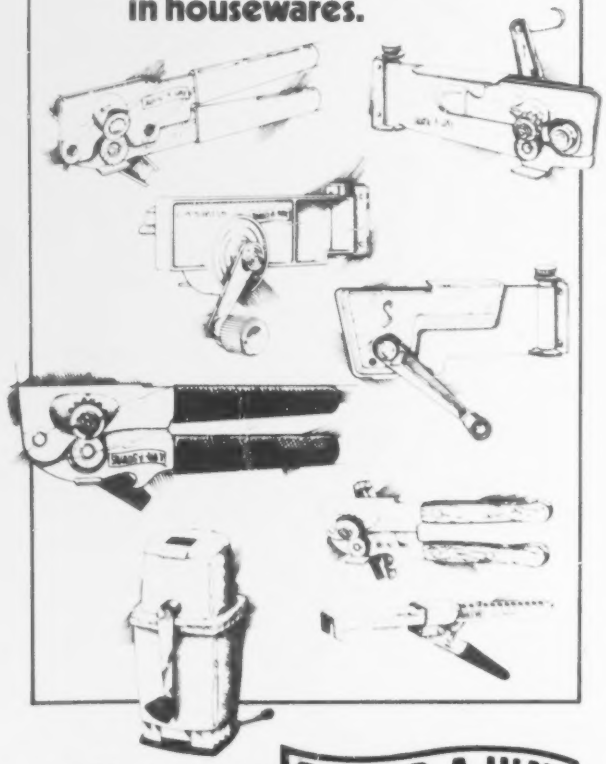
For more information, contact FLAVIA Corp., 11100 Westlake Drive, Charlotte, North Carolina 28217. Telephone 1-800-326-0685.

Swisspers™

Cotton Rounds for cosmetic removal

*Source: Simmons Market Research Bureau, Inc. 1987

One of the best-known, best-selling brands in housewares.



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